senior and disabilities services
harmony data system

State of Alaska

Senior and Disabilities Services

Harmony Data System Training Guide

T01 | Intro to Harmony

Contents

Introduction | Intro to Harmony Training Guide

Summary

This training guide covers the Harmony application's layout and navigation, along with basic functions of the program, such as creating and routing notes, working with reminders (Ticklers), checking Inquiry records in and out and the process of creating a consumer record.

Learning Objectives…

- ✓ Learn how to navigate through Harmony
- ✓ Define the relationship between records and fields
- ✓ Identify the importance of Notes and demonstrate how to add a note, attach a file and route it to someone else
- ✓ Understand the functions of ticklers and how to work with them
- ✓ Learn the functions of Workflow Wizards how to complete, and/or cancel the tasks associated with them
- ✓ Review functions of reports and how to work with them
- ✓ Identify the functions and important details in the Inquiry, Consumers Chapters

Chapter 1 | Login

Introduction

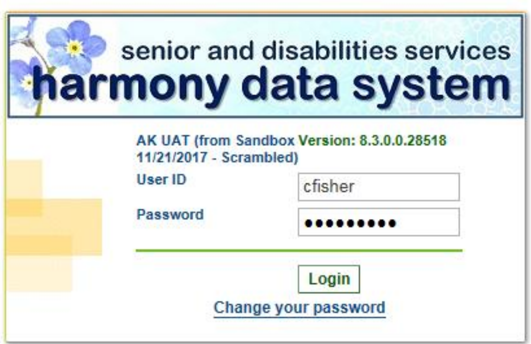
Like most applications, such as email, you need to log in before you can access and enter information. You probably know the importance of having a good password, since you are working with Personal Health Information, it is critical that you guard it. When you are finished using Harmony, it is also important to Sign Out of the program, rather than just stay logged in or closing the Internet browser you used.

Prior to Go Live in January 2018, users will log into the Harmony testing application using the standard log in functionality (user name & Password). After that, users will use a custom Single- Sign- On function. This feature will allow state employees the ability to automatically login, when they are connected to the state's network. Certified SDS Providers will also have a similar automatic login, but they will be required to log in their MyAlaska account first.

Note

A full description of the single sign of details are found in the *J30 Single Sign On* Job Aid.

Log in to Harmony



Harmony log in screen

Logging into the TESTING SDS Harmony Data System

1. Open Internet Explorer and then type the Internet address for Harmony:

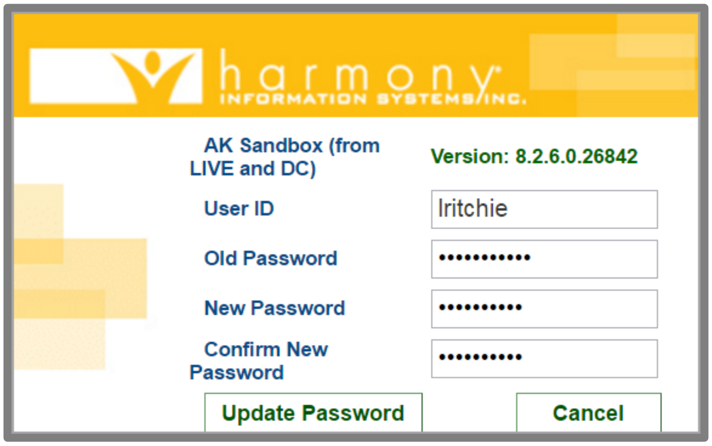
   SDS Testing Site: https://fw6.harmonyis.net/AKSDSUAT

2. Type your **User ID**. *(usually your 1st initial and last name)*
3. Type your temporary Password. (password)
4. Click **Login**. *You are immediately asked to change your password the 1st time you log in.*

Change Password

If you are logging in to the Harmony training site for the first time, you will be prompted to change your password.

1. After logging into Harmony, a screen is displayed where you can create a new password.
    a. Type your **Old Password**. (password)
    b. Type your **New Password** and then type it again in the **Confirm New Password** field.
    c. Click **Update Password**.



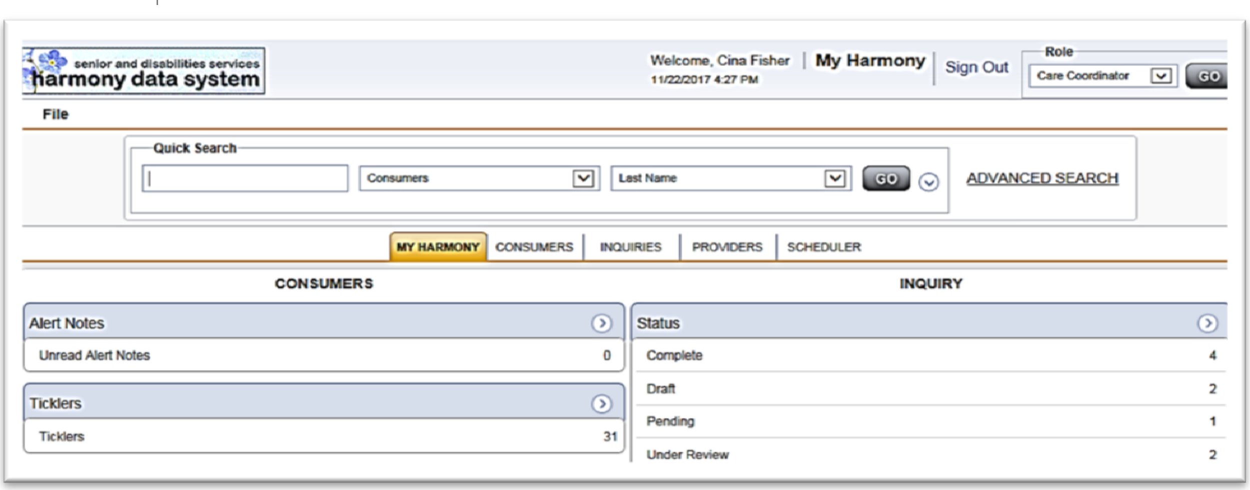
Harmony Change Password screen

Key Point

When changing your password, follow these guidelines:

- Must be at least 8 characters (a character is a number, letter or special character)
- Must include at least 1 lower case letter (a-z)
- Must include at least 1 special character (!, #, $, %, etc.)
- Cannot include a Capitol Letter
- *Cannot be reused*
- *Expires after 60 days*

You are allowed 3 unsuccessful login attempts, and then you will be locked out of your account. Check with your Harmony Administrator or SDS to have it reset.

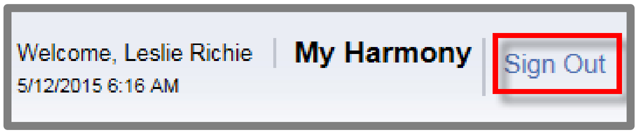


My Harmony Dashboard

Sign Out of Harmony

When you are finished using Harmony, you should sign out.

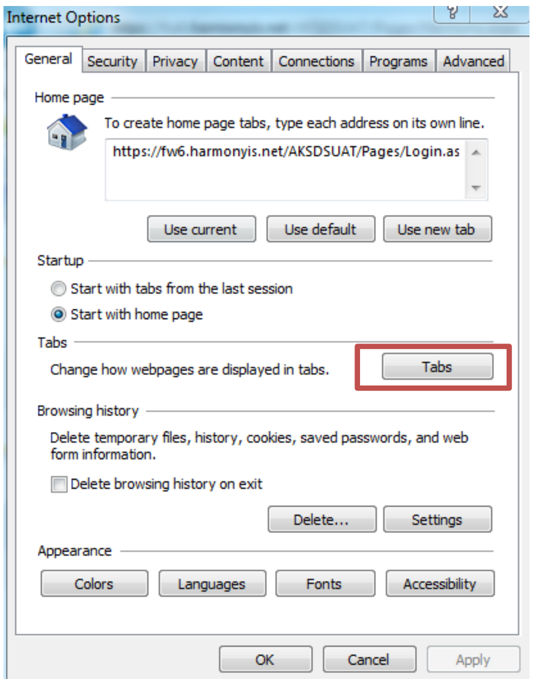
1. In the upper right corner of the screen, click **Sign Out**.

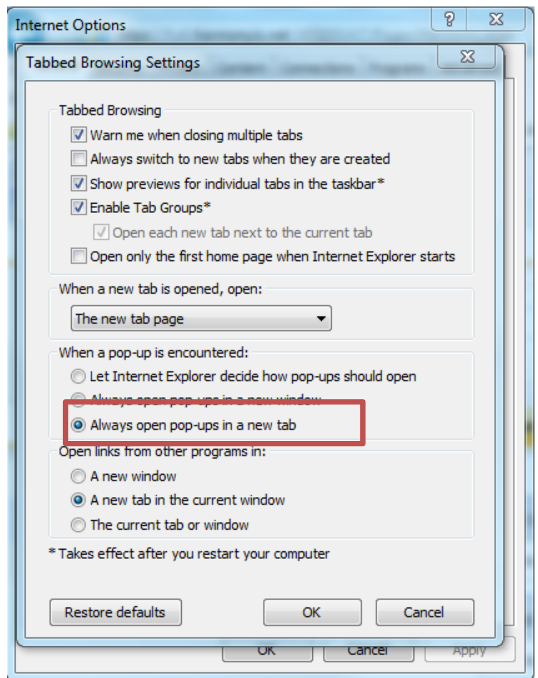


Sign Out Screen

Internet Browser Set-up

The system will time out after 60 minutes of in activity. For this reason we encourage you to set your Internet Explorer –Tools> Internet Options> Tabs to 'always open pop-ups in a new tab'.





Chapter 1 Quiz

1. In the SDS Harmony Live site, users will be required to log in to their ____________ account first to access the SDS Harmony data system.

2. True or False? If the SDS Harmony is not the active window on the computer for more than 60 minutes it will time out.

Chapter 2 | Roles

Introduction

A Role defines the functionality, screens, and permissions (read-only, add, edit, and delete) available to a Harmony user. Your assigned role is configured to allow you to perform your assigned job functions in the system. You may use more than one role for your work, so you'll need to change roles, depending on what you're doing in Harmony.

A Care Coordinator will have access to 2 roles:

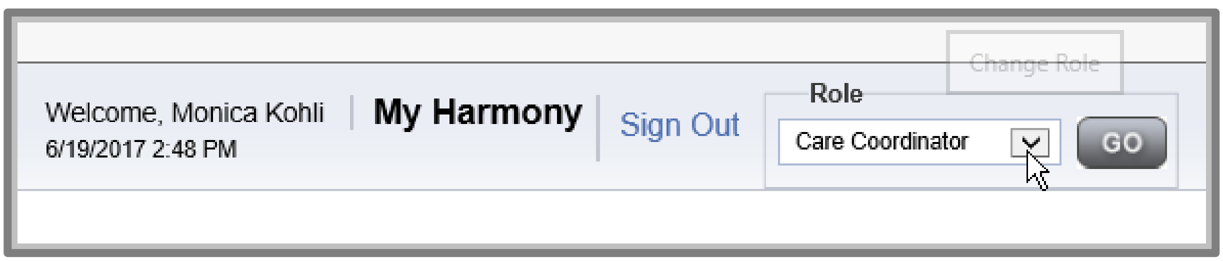
1. Care Coordinator
2. Provider Search

Roles are important to limit access to sensitive information. If you do not see certain information or tools in Harmony, it may be because your role does not allow it.

Change Roles

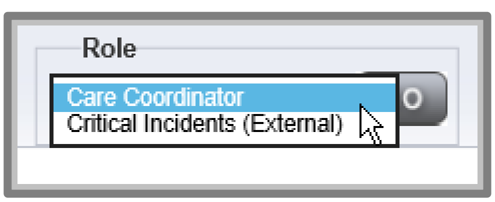
Some Harmony users will need to change roles from time to time. For example, to report a Critical Incident, the Care Coordinator will change their role to Critical Incidents (External). You can easily change roles in Harmony, following the steps below.

1. In the upper right corner of the Harmony screen, click the down arrow in the Role section.



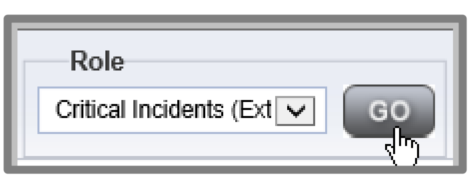
Change Roles Screen

2. Click the role you want to switch to.



Role List

3. Click **Go**.



Change Roles Screen

4. The screen will refresh and display the new role's **My Harmony** screen.

Practice Exercise

1. Change your role twice and document a couple of differences you notice between the different roles.

Chapter 2 Quiz

1. Roles in Harmony determine which of the following? (select one)
    a. The available functionality
    b. The available screens
    c. The available permissions
    d. All of the above

2. True or False? Your current role displays in the upper right corner of the main Harmony window.

3. To change your role, select a role from the drop-down list and click (select one):
    a. Sign Out
    b. Go
    c. The Consumers chapter
    d. Internet Explorer Help

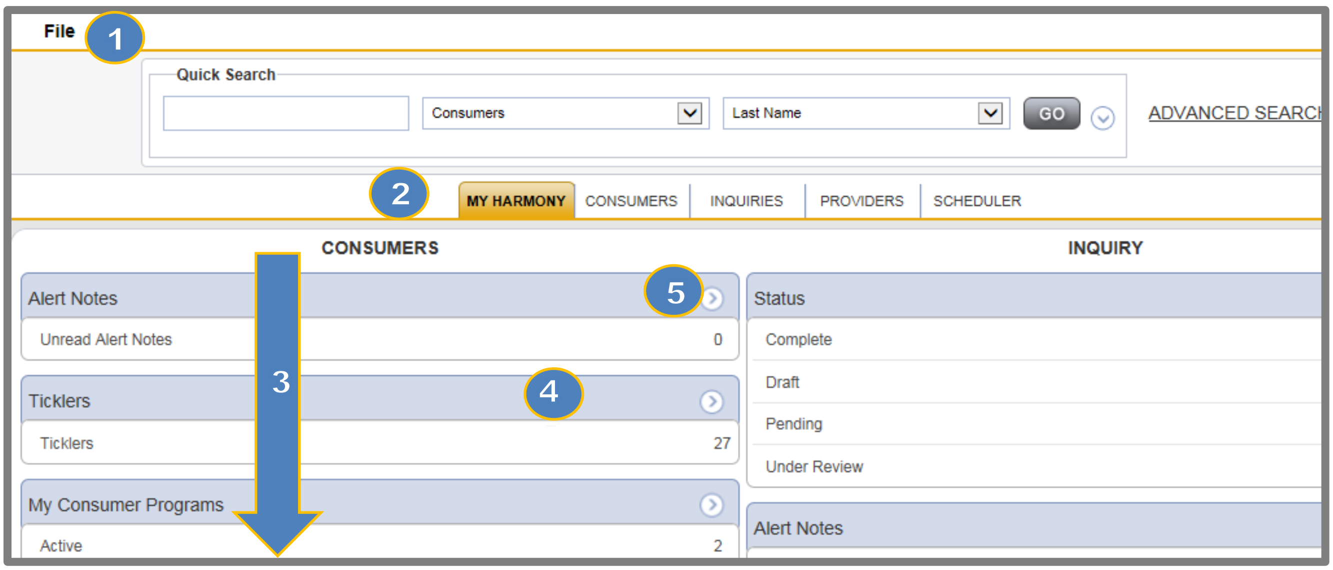
Chapter 3 | My Harmony

Introduction

My Harmony is the first place you see when you log in to the Harmony application. **My Harmony** serves as a home page in the system displaying panels that provide counts of records assigned to you, including ticklers to complete and notes to read. These panels are also shortcuts to viewing and working with the underlying lists of records.

My Harmony Screen Elements

There are several parts of the **My Harmony** screen, as shown in the screenshot below. Your screen may look a little different.



My Harmony

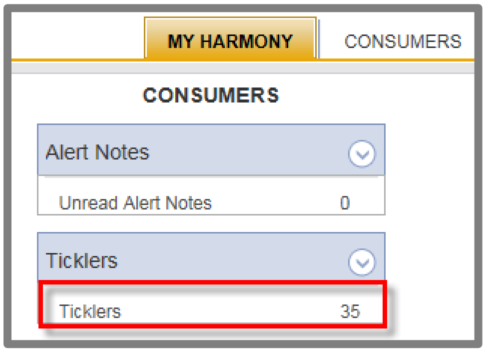
Area	Description
1	The **File** menu is located throughout the system. Items on the **File** menu change, depending on what you are doing. The most common things you will do on this menu are to add and save files.
2	The tabs along the top of the screen are called **Chapters**. A chapter is main workspace section within Harmony. To open a chapter, click the tab. The available chapters are defined by your role.
3	**My Harmony** is organized into columns for inquiries, consumers, providers, and tasks. Each column includes panels for ticklers, notes, and other queues of information available to you.
4	**My Harmony Panels** are widgets that contain a header and a breakout of line items by type or status with a record count. Click on a panel line item to open the underlying list in a separate window.
5	Each panel header includes a **toggle** button to collapse or expand the panel.

Key Point

If you have already clicked a **My Harmony** panel to open a list in a separate window, and you kept that window open, then additional clicks on **My Harmony** panels will **load in that first window** and will not open additional windows.

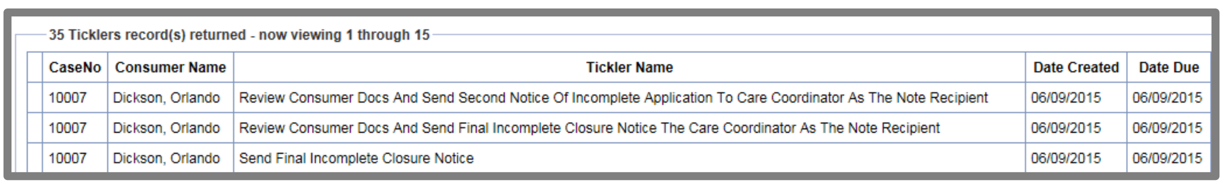
Panels

1. Each panel on the **My Harmony** home page contains one or more links with a count of related items. In the example below, the current User has 35 Consumer Ticklers assigned to them or their Role.



My Harmony Consumer Ticklers

2. Click on the panel link to open the list of items in a new window:



35 Ticklers record(s) returned - now viewing 1 through 15

CaseNo	Consumer Name	Tickler Name	Date Created	Date Due
10007	Dickson, Orlando	Review Consumer Docs And Send Second Notice Of Incomplete Application To Care Coordinator As The Note Recipient	06/09/2015	06/09/2015
10007	Dickson, Orlando	Review Consumer Docs And Send Final Incomplete Closure Notice The Care Coordinator As The Note Recipient	06/09/2015	06/09/2015
10007	Dickson, Orlando	Send Final Incomplete Closure Notice	06/09/2015	06/09/2015

List Page

3. Click anywhere in the row to open the record or complete a task.

Practice Exercise

1. On the **My Harmony** home page, in the **Consumers** column, under the **My Consumers** header, click on the **Active** panel link.

Chapter 3 Quiz

1. My Harmony is organized into columns for:
   a. Inquires
   b. Consumers
   c. Providers
   d. Tasks

2. True or False? Users can access their Active Consumers list from My Harmony.

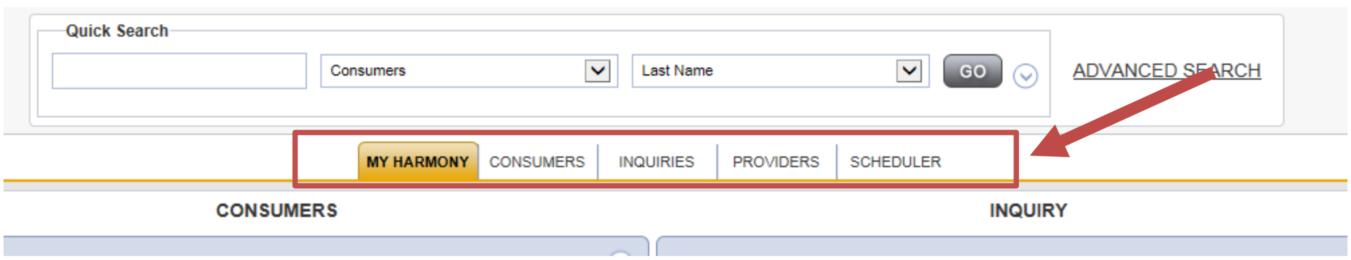
Chapter 4 | Layout and Navigation

Introduction

This chapter provides an orientation to the layout and structure of the Harmony application as well as instructions and tips on how to navigate within Harmony. The Harmony application is organized into chapters, tabs, pages, and fields.

Chapters

Chapters are the main workspace areas in Harmony. Chapters display in a bar near the top of the screen in the main Harmony window, below the Quick Search bar. Chapter buttons look like file folder tabs. The available chapters will vary depending on your role. For most roles, the My Harmony chapter loads as the default chapter at login. The current chapter is highlighted in orange in the chapter bar. To select a different chapter, click on the chapter button.



Harmony Chapter Bar

Chapter	Definition
My Harmony	The system home page that presents panels and queues of records in the system that are relevant to the current user, including assigned tickler tasks, notes to be read, and Consumer caseloads.
Consumers	Functionality for managing case files for persons who are applicants for or recipients of services. In the Consumers chapter, users work with one Consumer record at a time.
Inquiries	The system "front door" area for tracking requests for information, prescreening, program referrals, and requests from Providers to access to a Consumer record in order to submit an application.
Providers	SDS Functionality for managing billing and rendering agencies, their workers, and their contracted organizations and facilities. The Provider chapter tracks certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information. **CCs will only be able to see limited information**
Scheduler	Allows you to see when your consumer has been scheduled for an assessment. If you accept the invitation to attend you will automatically receive any scheduling updates. It is not required for Care Coordinators to attend Assessments – this is a courtesy notification.

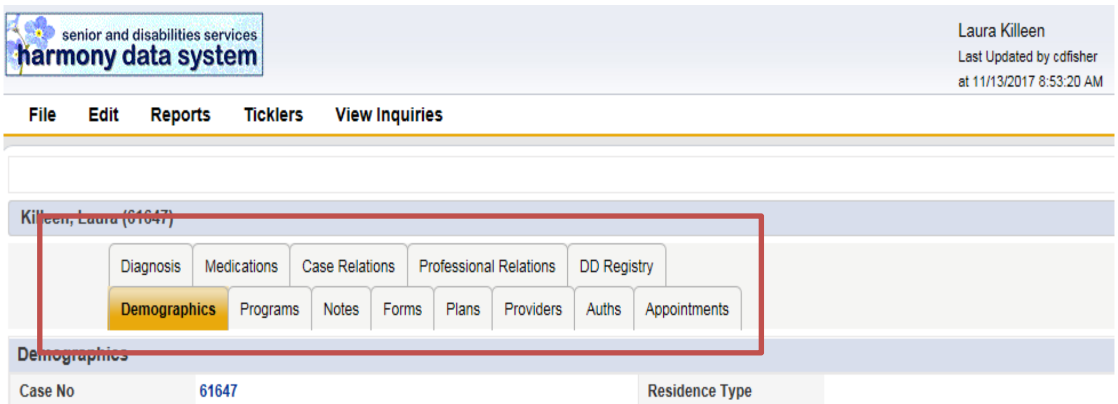
Key Point

The Consumers chapters are designed to have you work on one Consumer at a time. If you change consumers any screens running the background will not be saved.

Tabs

Chapters are organized into tabs. Tabs display lists of information in different information areas.

Tabs display like rows of file folder tabs below the Chapter bar and the current record name and number:



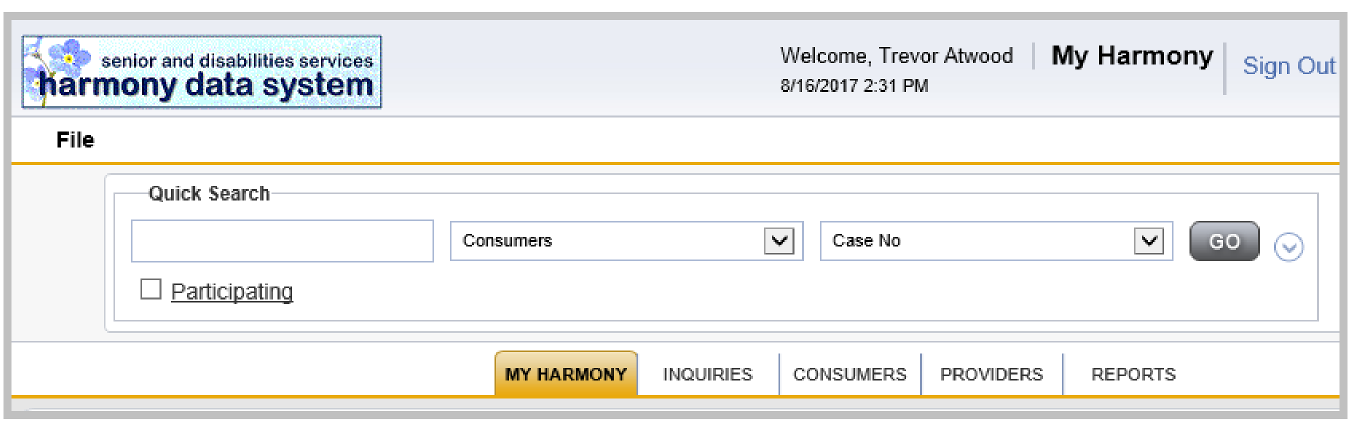
Consumer Chapter Tabs

Quick Search

Quick Search is an alternative to Advanced Search that works best when you're looking for a specific record and you have a definitive search filter value, such as a Consumer's CaseNo or an Inquiry ID.

To use Quick Search:

1. Enter the value
2. Select the chapter
3. Select the filter field
4. Click the **Go** button



Quick Search Bar

Pages

The Harmony system has three standard types of pages:

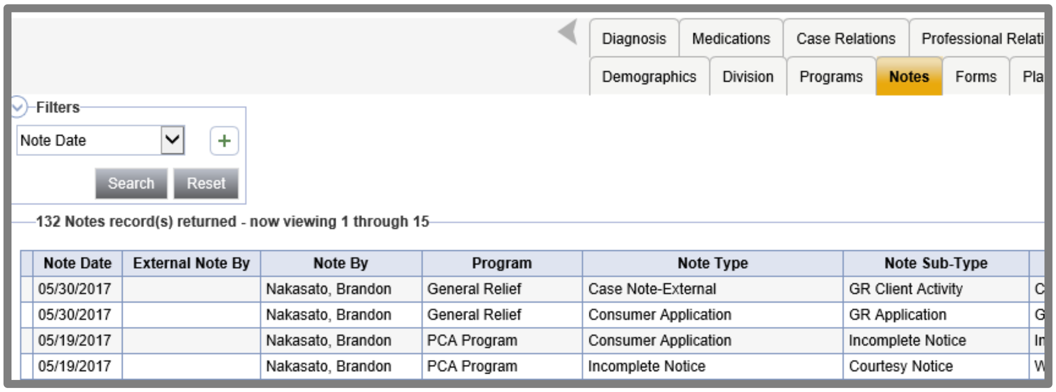
1. List Pages

2. Detail Pages
3. Search Pages

To work with a Consumer or Inquiry record, you must first search and select it using a search page. The chapter will load upon selecting the record. If it is the only record matching the search perimeters then it will automatically open the record.

List Pages

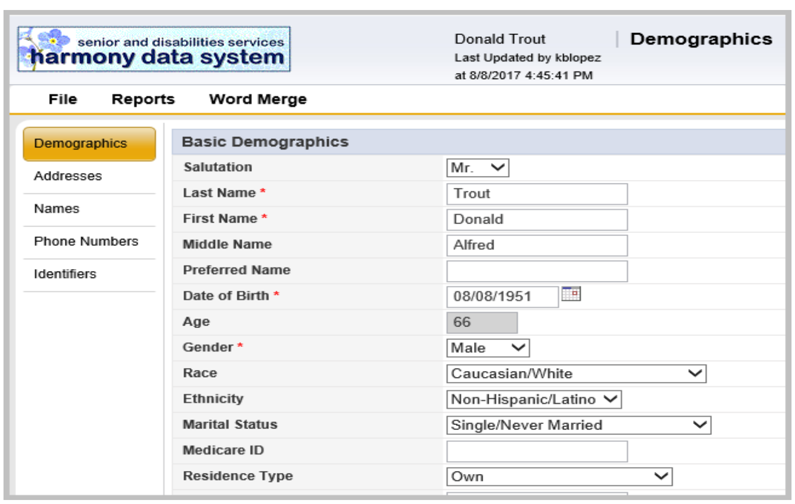
Most tabs in the Consumers and Providers chapters display a list page when selected. A list page works like a fixed search page that returns results automatically. The results on a list page are the records for the current Consumer or Provider in that information area. For example, the Consumer Notes tab displays a list of Note records entered for the current Consumer. List pages also display via many subpages.



Consumer Notes List Page

Detail Pages

A detail page is a screen in Harmony used to add or edit a record. Most detail pages contain a single vertical column of data entry fields with the field label on the left and the data entry field to the right.

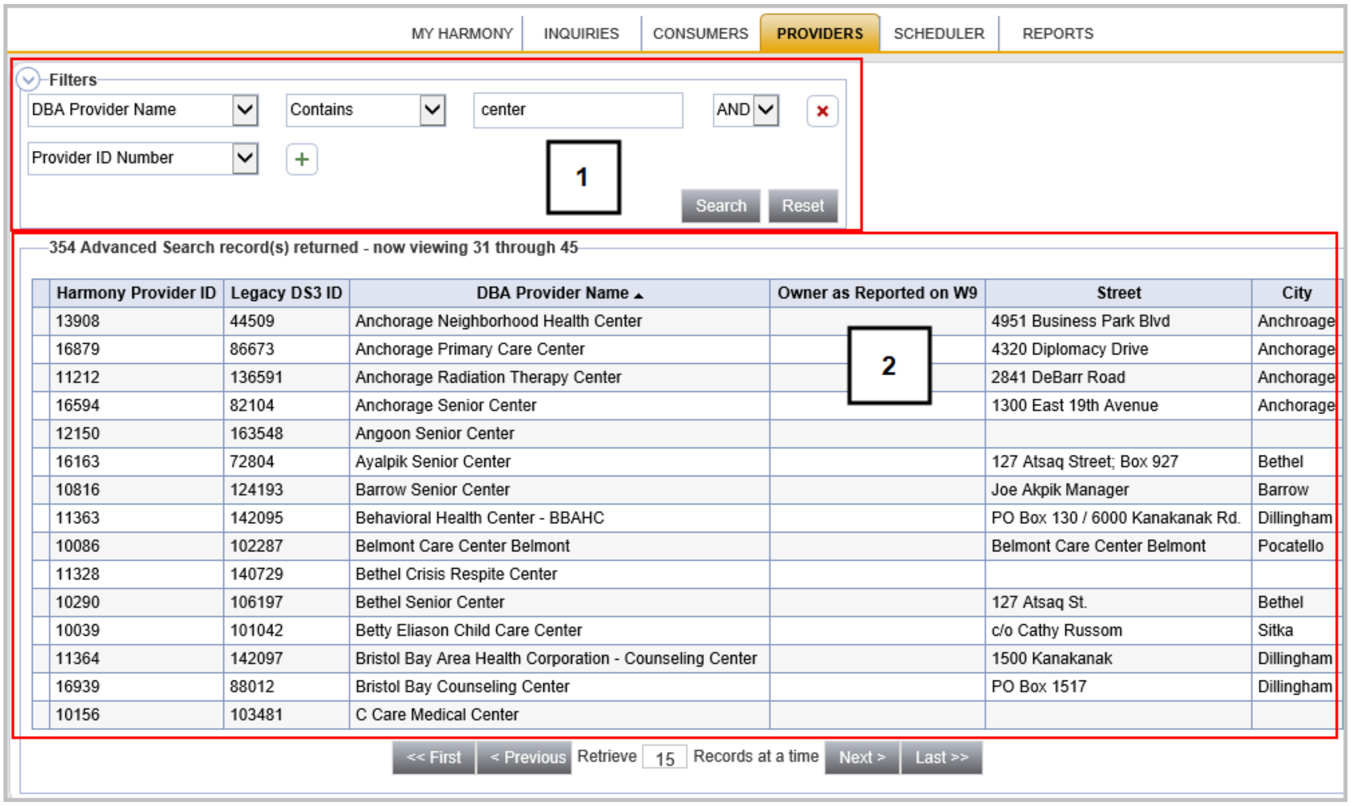


Consumer Demographics Detail Page

Advanced Search

The Advanced Search page is a tool for searching and selecting a Consumer, Provider, or Inquiry record, and is the page that displays when a user clicks on one of these chapters. Search pages have two primary sections:

1. Search Filters above, including a **Search** button
2. Search Results below



Provider Advanced Search

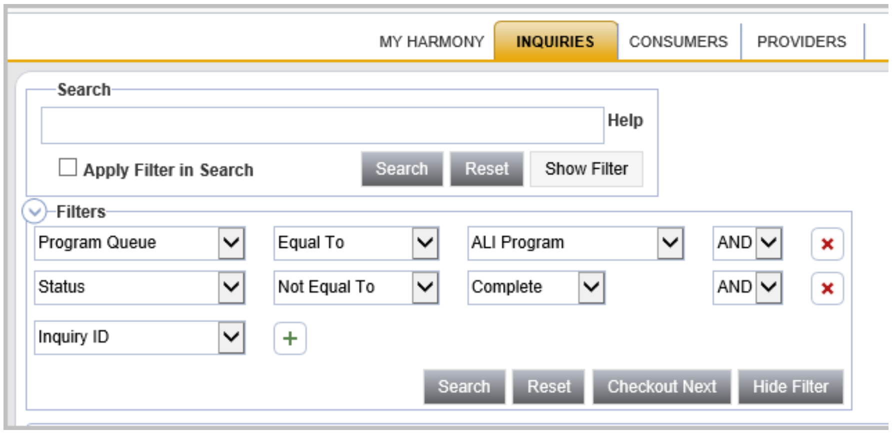
Search Filters

Each search filter contains four parts:

1. **Filter Field**: the data point to search on
2. **Operator**: the relationship between the filter field and the value
3. **Value**: the filter field answer to search on
4. **Connector**: the relationship between this filter and other filters in the search

In the Inquiry Advanced Search example, the following two filters are applied:

Filter Field	Operator	Value	Connector
Program Queue	Equal To	ALI Program	AND
Status	Not Equal To	Complete	AND



Advanced Search Filters

Using these filters, the Advanced Search page is similar to a queue for requests to SDS regarding the ALI Program that need to be worked.

Operators

Each filter row includes an operator that defines the relationship between the filter field and the value:

Operator	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as “equal to” a specific person’s name, the Consumer records assigned to that worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as “begins with” ‘T’ the system will return records assigned to the worker having last names that start with ‘T’, such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> “ends with” ‘r’, you can retrieve records where a Consumer’s name ends in ‘r’, such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a particular name is entered for <Last Name>, the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as “greater than” ‘03/01/2015’, the system will return all records with a records whose dates of birth are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as “less than” ‘03/31/2015’, the system will return data for all records with a birth date before March 31, 2015.
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as “contains” specific values in the person’s name, the Consumer Record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

Connectors

The connector options of “AND” and “OR” between multiple filters have the following effects:

- **AND** tightens your search: only returns records that meets <u>ALL</u> filter criteria.

Example

Find Consumers where **<DOB>** is greater than (>) March 1, 2000 AND <DOB> is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** broadens your search: returns records that meet <u>ANY</u> of the filter criteria.

Example

Find records where **<Last Name>** equals <Jones> OR **<DOB> =** “June 22, 1998.” The system returns Consumer records with last name of Jones, regardless of date of birth, and also returns any Consumer records whose birth date is 6/22/1998.

Modifying Filters

The Advanced Search page opens with default filters that have been set up for your role. Users can modify their search by adding, changing, or removing filters. The available filter fields are based on data points within the records you’re searching – attributes of Consumers, Providers, or Inquiries.

- **Add a Filter**: To add another filter to your search, click the green + button to the right of the bottom filter row. Then proceed to set the filter field, operator, value, and connector for the filter.
- **Change a Filter**: To change an existing filter row, change any of the four filter parts as needed.
- **Remove a Filter**: To remove an existing filter from your search, click the red x button to the right of a filter row.

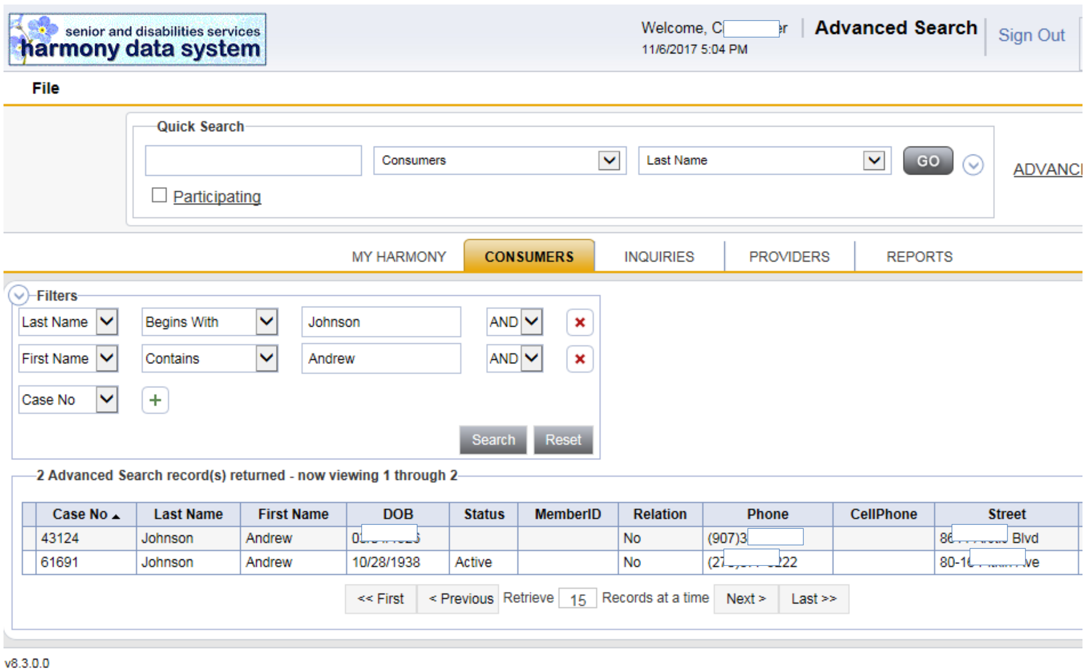
Note:

In addition to the search filters you apply, search results will be limited by the security settings of your role. For example:

- External Provider roles, such as Care Coordinator or PCA Admin, will only see search results for Consumers that are actively associated to the worker’s Provider record
- SDS and ADRC roles have access to search on all Consumers in the Harmony system.

Search Results

Once you've adjusted your search filters, click the **Search** button to load or refresh your search results. The search results section of the Advanced Search page displays the results based on your search filter criteria in a table grid with columns of data points and rows of search results records.



Provider Advanced Search Results

Search Results Features

- **Sort**: The results will be sorted by default on the column with a black triangle icon indicating sort direction: ascending (pointing up) or descending sort (pointing down). Here, results are sorted in ascending order on DBA Provider Name.
  - You can sort on a different column by clicking on the column header.
  - You can toggle to reverse the sort direction by clicking on the sorted column header again.
- **Count**: The search results zone will display a count of records that match the filter criteria. In the example above, there are 1,341 records returned.
- **Paginated Results**: Harmony is configured to return up to 15 search results at a time. When the results of the search exceed that limit, the search results section will identify which 15 records in the overall results set are displaying.
- **Results Navigation**: When your search results in more than 15 records, you can navigate the "pages" of results using these four buttons at the bottom of the search results section:

Button	Description
<< First	Jumps to the first set of results
< Previous	Jumps to the previous set of results
Next >	Jumps to the next set of results
Last >>	Jumps to the last set of results

  - You can also increase the number results per page by editing the default value of 15 at the bottom of the page and then clicking one of the results navigation buttons.

- **Flyout Menu**: Some search pages and list pages include flyout menus on the row level at the far right side of the columns. Flyout menus provide additional options for interacting with that record beyond just clicking to select it. Hover over the triangle icon to display a flyout menu, and then click to select a menu option.

Program Queue	Checked Out To	Status	Consumer First Name	Consumer Last Name	Staff Conducting Inquiry	☐
ALI Program	Beplay,Dale	Pending	Jason	Werth	Beplay,Dale	☐
ALI Program	Kohli,Monica	Pending	Smoke	Test	Kohli,Monica	☐
ALI Program	Beplay,Dale	Pending	Matt	Jones	Beplay,Dale	☐
ALI Program	Atwood,Trevor	Pending	John	Adams	Farrell,James	☐
ALI Program	Beplay,Dale	Pending	Matt	Harvey	Beplay,Dale	Check In Item
ALI Program	Beplay,Dale	Pending	warren	fisher	Fisher,Cina	☐
ALI Program		Pending			Podunovich,Anastasiya	☐

Inquiry Advanced Search Flyout Menu

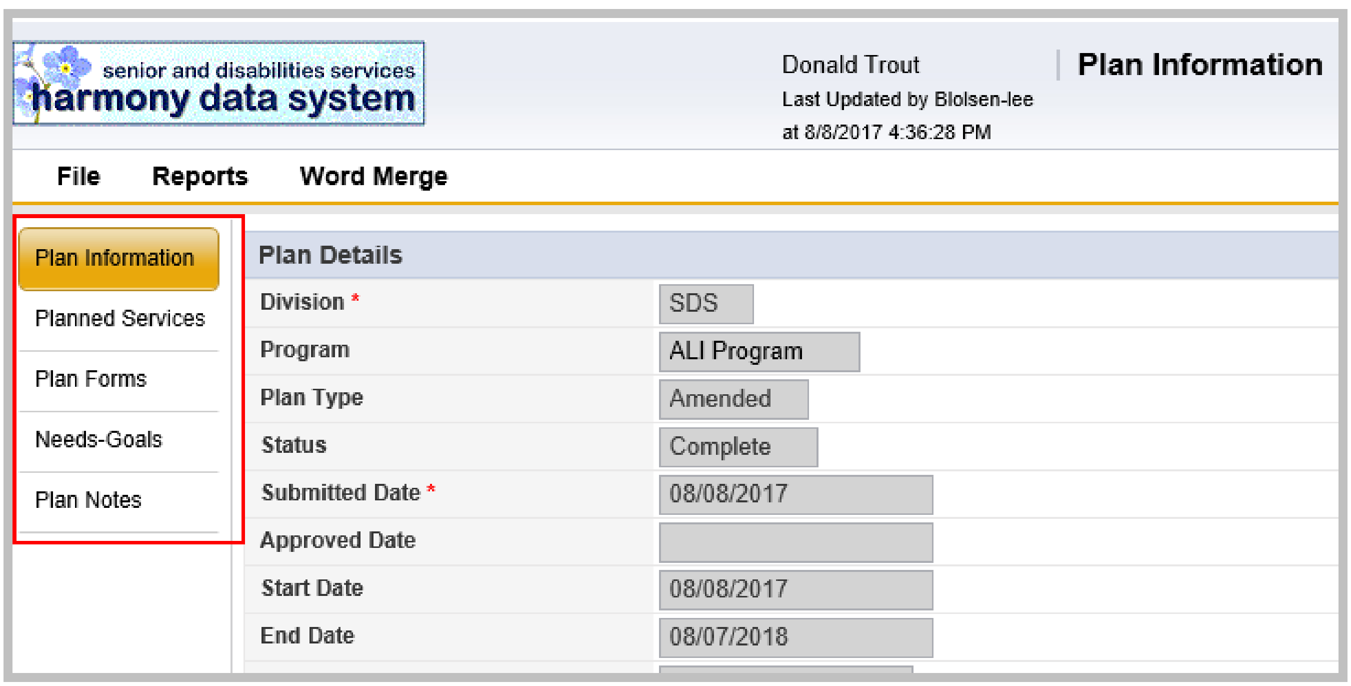
When you find the right record in the results, click on that row to open that record and load the chapter. Now you can proceed to work with that record to review, add, or update information.

Key Point

To select a search result, **click anywhere on the row** in the search results.

Subpage Menu

If a record has additional records under it, Harmony present a subpage menu to the left of the main detail page. The subpage menu consists of buttons that open list pages or detail pages for the related information. To select a subpage, click the subpage menu button. The current selected subpage is highlighted in orange.



Consumer Plan Subpage Menu

Note

Subpage menus only display when viewing/editing a record after the initial save; they will not display when first adding a new record.

File Menu Bar

The **File** menu is displayed throughout the application, located in the upper left corner of the screen. Depending on the screen that is open, other menus may be displayed. This is the location where you'll go to create or add records, close and save records and print, among other functions.

Additional functions remain available under each option. Hovering above each **File Menu** bar category will expand additional menus. Access to these are granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save**, **Save and Close**, and **Print**.

File Menu

When users scroll through a page in Harmony, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

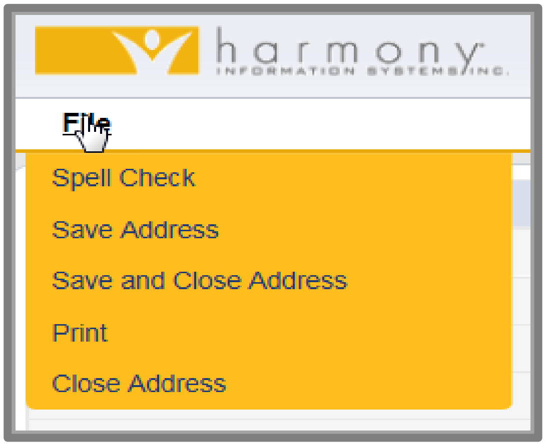
- **File**: Contains the functions to add a new record or to view history changes to the data in view.
- **Edit**: Provides the ability to make changes to the data included in the record.
- **Tools**: Provides the user with additional functionality based on the page currently in view.
- **Reports**: If a user has access to the Reports menu, click the menu and select the report and it will open in a new window
- **Ticklers**: Provides the user with a list of "ticklers" or reminders generated for a specific Consumer or Provider. This menu is only displayed at a chapter level.
- **Word Merge**: Contains customized Microsoft Word documents which "merge" in specified information, such as a client name and address. Often used for letters. Select the document to merge and it will open in a new window.

Practice Exercise

1. Look for **My Consumers** and click on the # in the active Row, open any Consumer record by clicking on it, cycle through the different tabs and notice the how the **File** menu options change for each tab.

Save and Close

As you work with records, there are several options to save your work and/or close the file you're working with. The **File** menu displays these options in the context of the task. In the screenshot below, the user is working in the **Consumer Demographics** screen, in the **Address** subpage.



Option	Definition
Save	Save changes and keep the file open. Because the user is working in the **Address** subpage, the option is **Save Address**.
Save and Close	Save changes and then close the file. In the example above, the option is **Save and Close Address**.
Close	Close the file without saving changes. In the example above, the option is **Close Address**.

Field Formats

There are several different types of data fields within Harmony, such as text boxes, checkboxes, date fields, dropdowns (sometimes called lookups) and search fields.

Required Fields

Required fields are always indicated by a red asterisk (*)

Required Field

Linked Fields

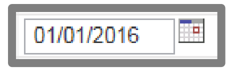
Sometimes choosing a value in one dropdown field will filter or change the values shown in another dropdown field on the same page. This is indicated with a blue asterisk (*) to the right of the field.

Linked Lookup Field

Date Fields

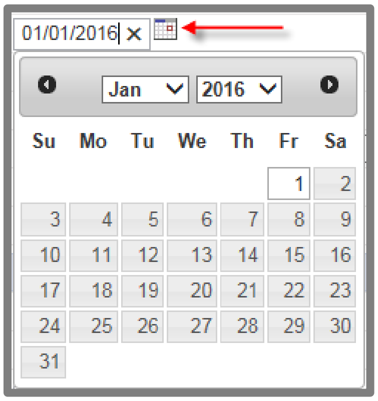
Date fields can be populated in either of two ways. First, the user can simply type the numbers and Harmony will automatically format the field.

E.g. for this date field, the user typed: 01012016



Date Field

The other option is to click on the calendar icon and use the calendar display. To select a specific date, simply click on the number after the correct month and year are chosen.

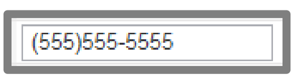


Calendar Selection

Pre-formatted Fields

Some fields are pre-formatted for certain types of data, most commonly this includes SSN and Phone fields. The user simply has to type the numbers and Harmony will automatically add the appropriate formatting such as dashes or brackets. *** SDS does not collect SSN

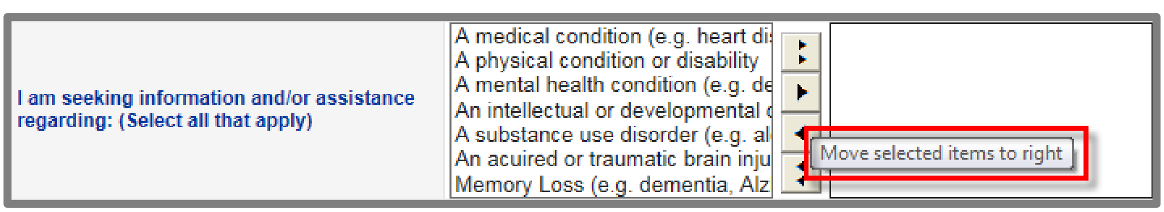
Example: for this phone field, the user typed: 5555555555



Pre-formatted field

Multi-Select Fields

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a tooltip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.



Multi-Select Field

Multi-Select Buttons

Move all items from the left to the right

Move selected items from the left to the right

Move selected items from the right to the left

Move all items from the right to the left

Shift and Ctrl Keys

- If you want to select more than one item, and the items are listed consecutively, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.
- If you want to select more than one item, and the items are not listed consecutively, press and hold the **Ctrl** key on your keyboard and click the records you want. Click the right-facing button to move the items to either the right or left field.

Places

The Places feature in Harmony allows address fields to be linked together and prefill or filter the options for the linked location fields. This also prevents users from selecting incorrect combinations.

Blank Places Fields

Entering a ZIP Code first will filter the other fields automatically, and if there is only one option, the other fields will pre-fill. The fields below were all populated simply by entering a ZIP Code of 20190.

Populated Places Fields

Chapter 4 Quiz

1. True or False? Providers can access any and all consumer records in Harmony.

2. The Quick Search function allows a user to find what type of records?
   a. Consumers
   b. Providers
   c. Inquiries
   d. All of the above

Chapter 5 | Consumer Records

Introduction

A consumer record contains all the information about a consumer, such as their name and address, their Care Coordinator and Support Plan details.

Learning Objectives…

- ✓ Describe the parts of a Consumer Record
- ✓ Explain how to check the Consumer's Status

Consumer Records

In Harmony, a consumer case includes a demographics record representing the person along with numerous other associated records for different types of information captured in different tabs.

Demographics			
Case No	58938	Residence Type	Rent
Last Name	Ingram	Total in Home	2
First Name	Helen	SSN	
Middle Initial	Tillotson	Medicaid ID	6587451
Preferred Name	Helen	DS3 ID	
Date of Birth	7/7/1978	Primary Language	
Age	38.6	Birth Place	
Date of Death		Primary Alaskan Tribe	
Gender	Female	Home Village	
Race	Caucasian/White	Alaska Resident	Yes
Ethnicity		Citizenship Status	US Citizen
Marital Status	Single/Never Married		

Consumer Record

Key Point

Providers can only access a consumer record after they have submitted an inquiry requesting access and SDS has processed that request.

Programs

The **Programs** tab (also referred to as "Enrollments") associates a consumer with an SDS program. The Program status tracks a consumer's stage in the program life cycle, as they move from application, to assessment, to planning, to authorization, and active program involvement as a recipient. Program status will also reflect the stages of the subsequent renewal cycles and eventual closure.

Program Record

Each consumer will have at least one program record. "Combo clients" will have a separate program record for each program in which they are involved. For example, a consumer could be approved for both ALI Waiver and PCA program. Program involvement history also displays here. For example, if a child was involved with the CCMC Waiver and then transitioned to the APDD Waiver, the past involvement in the CCMC Waiver program will continue to display as a program record.

Program	Description
ALI Waiver	Alaskans Living Independently Program
APDD Waiver	Adults with Physical and Developmental Disabilities Program
CCMC Waiver	Children with Complex Medical Conditions Program
DD Eligibility	Developmental Disabilities Program Eligibility
DD Registry	Developmental Disabilities Program Registry
General Relief	General Relief Program
IDD Waiver	Intellectual & Developmental Disabilities Waiver Program
LTC Facility	Long Term Care Facility Program
LTC ICF-IID	Long Term Care Intermediate Care Facility for Individuals with Intellectual Disability Program
LTC-AWB	Long Term Care Facility Admin Waiting Bed
LTC-Swing Bed	Long Term Care Facility Swing Bed Program
Nursing Facility Transition	Nursing Facility Transition Program
PCA	Personal Care Services Agency Program
TEFRA	Tax Equity and Fiscal Responsibility Act Program

Forms

The **Forms** tab allows users to view, edit, and add system created forms pertaining to a consumer.

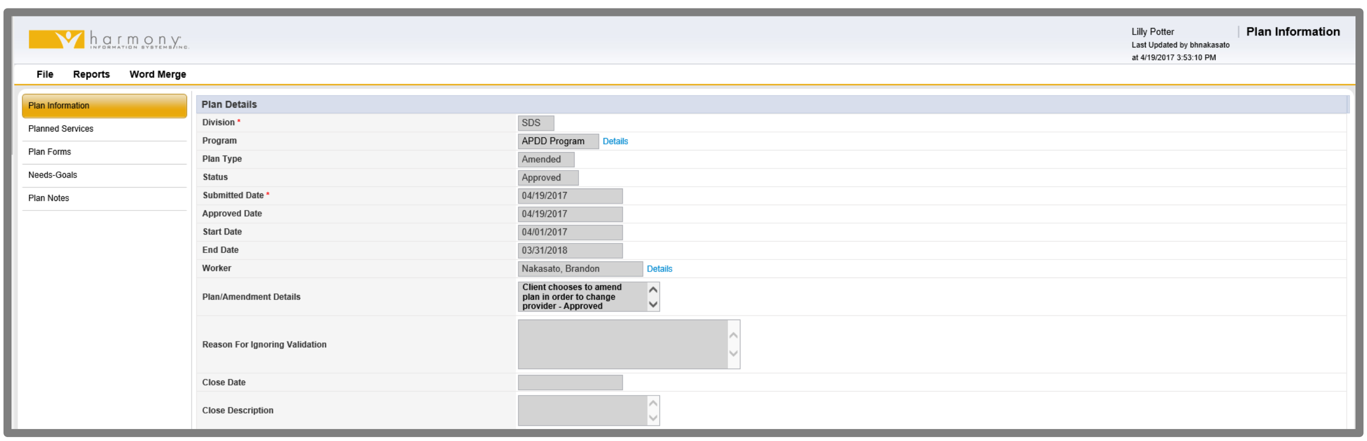
SDS has configured multiple forms and assessments in the Harmony application. Some forms are very large, have complex configuration and can have data pulled into another feature or report. Forms are unique to each Chapter (Inquires, Consumers, Providers, etc…); they can be limited to a specific role and can be assigned as a tickler.

Example

To complete the Support Plan some details like the Emergency Response Plan and the Personal Profile must be entered on a separate form. The Care Coordinator completes this form and this form information feeds into the Support Plan Report

Plans

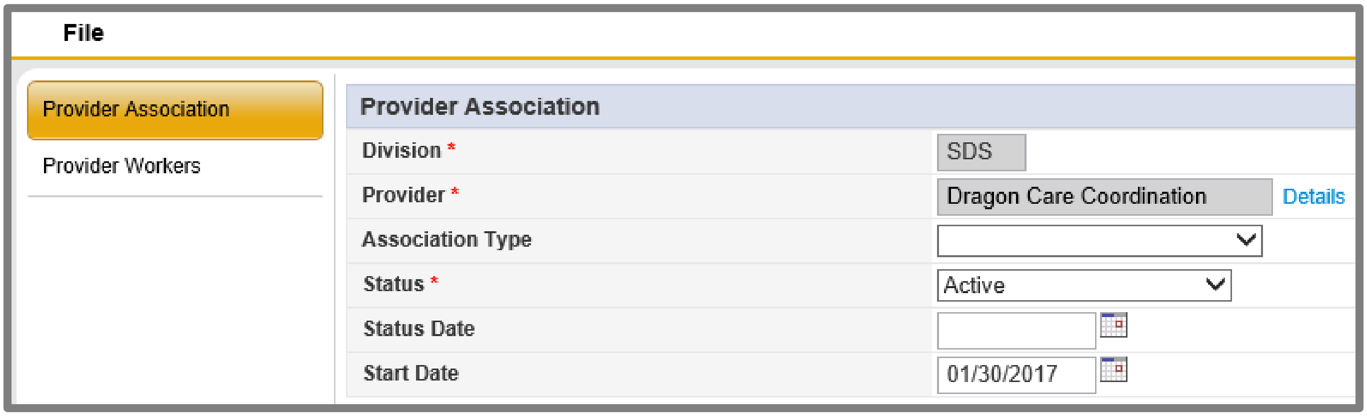
The **Plans** tab is used to track PCA Service Plans and Person Centered Support Plans. A Consumer will have a separate plan record for each plan period, and if the Consumer is a Combo Client, they'll have a different plan for each program (where applicable). The Plan Information page defines the plan period, program, and cycle. The **Planned Services** subpage contains the formal services and activities within the plan. Personal goals and goals that describe services are tracked under **Needs**. The **Plan Forms** page includes forms for collecting additional details on the plan.



Plans Record

Providers

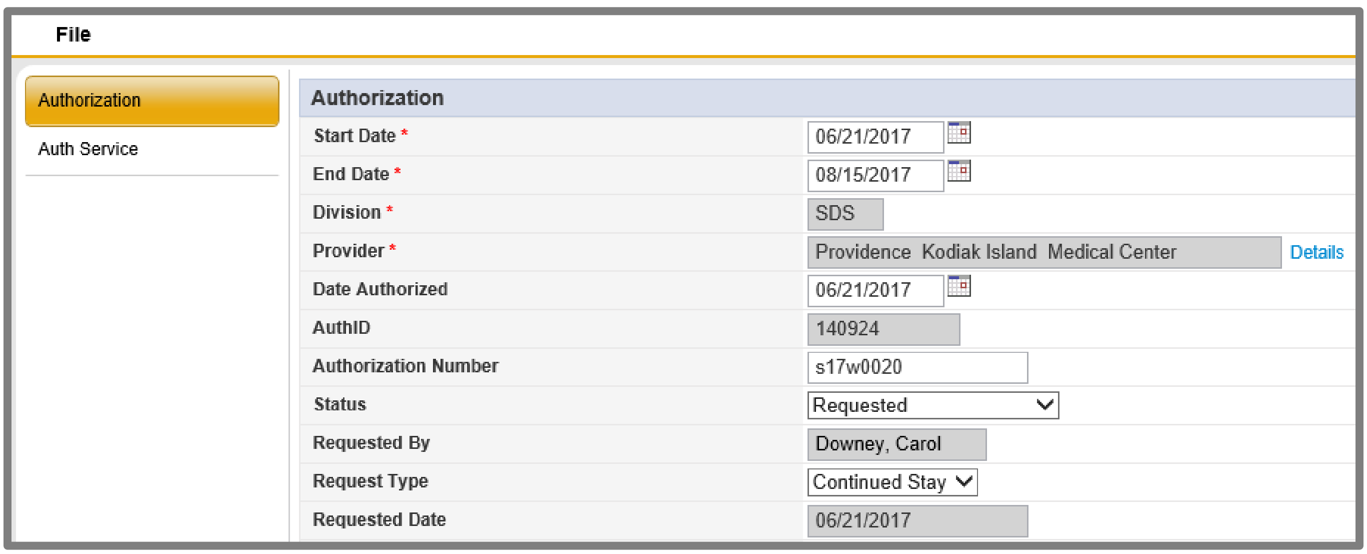
The **Providers** tab is used to track all Service Providers associated with the consumer. Once a provider record is associated to the consumer, all workers assigned to that provider will have access to that consumer's record.



Provider Association Record

Authorizations

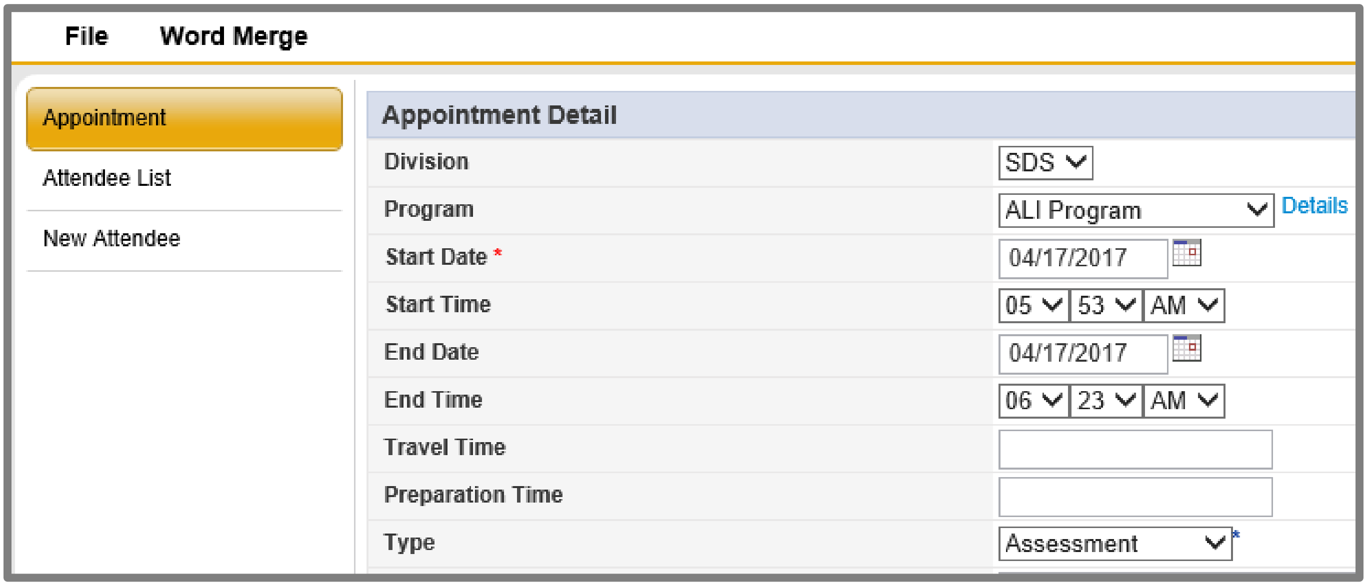
The **Authorizations** (Auths) tab allows a user to view the authorizations a consumer has to receive specific services from specific providers.



Authorization Record

Appointments

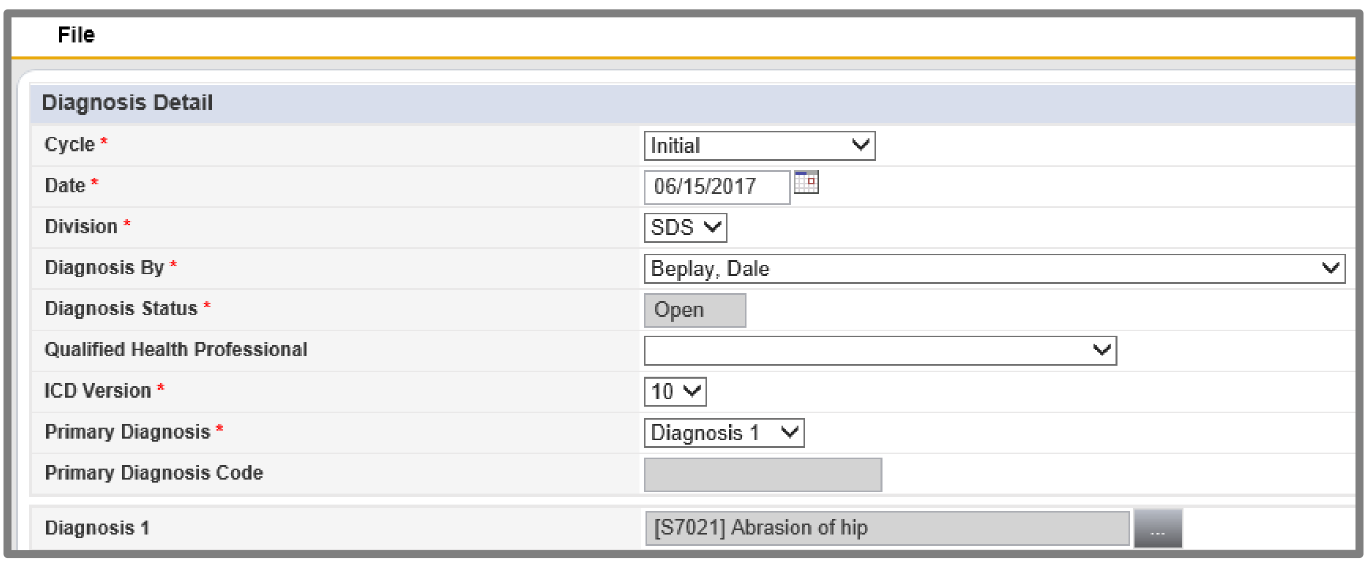
The **Appointments** tab is used to track appointments for the consumer or is regarding the consumer, but involved the case and provider workers. Usually this is any scheduled assessments.



Appointment Record

Diagnosis

The **Diagnosis** tab allows users to view, edit, or add International Statistical Classification of Diseases and Related Health Problems (ICD - 10) diagnoses into Harmony. **(Only SDS Staff can add to this tab)**



Diagnosis Details

If you receive a new diagnosis for the consumer, attach the written documentation (Usually a VOD or QDC Form) to a Consumer note for SDS to add the diagnosis.

Medications

The **Medications** tab is used to record information on the medications prescribed to consumers. This tab enables recording of consumer medication information, and does not act as an interactive pharmacy system. It does maintain information on discontinued medications even if they don't print on the Support Plan.

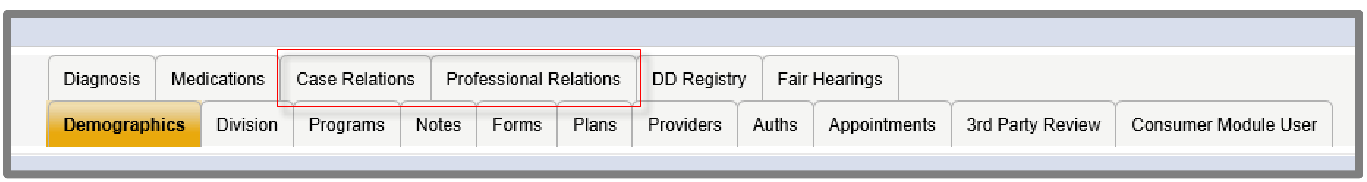
Medication Details

Case and Professional Relations

In Harmony **Relations** tabs allow workers to view, edit or add data pertaining to family/case and professional persons who need to be associated with the consumer.

- The **Case Relations** tab is used to track family members such as mother, father, spouse, daughter, son, etc. and any other unpaid caregivers.
- The **Professional Relations** tab is used to track individuals who are involved with consumer such as doctors, clinics, physical therapist, etc. and used to track other Harmony users/workers who have access to the system.
  - To add an MD, as a Professional Relation to a Consumer, the user must search with "DX-First letter of last name (at a minimum)". SDS maintains a list of diagnosing professionals.
  - If you do not find your MD on the list, the follow the steps outlined in Job Aid J16 VOD Doctor list and faxing.

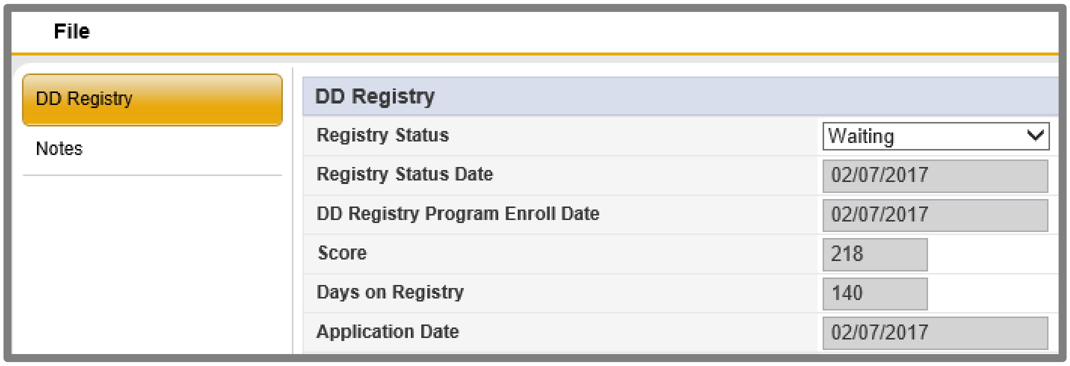
In these tabs, information, such as the names, addresses, home, work telephone numbers, relationship to the consumer, and other identifying information for individual is entered. If a relation needs access to the consumer record via the Consumer Portal, then a valid email address must be part of the relations record.



Case Relations tabs

DD Registry

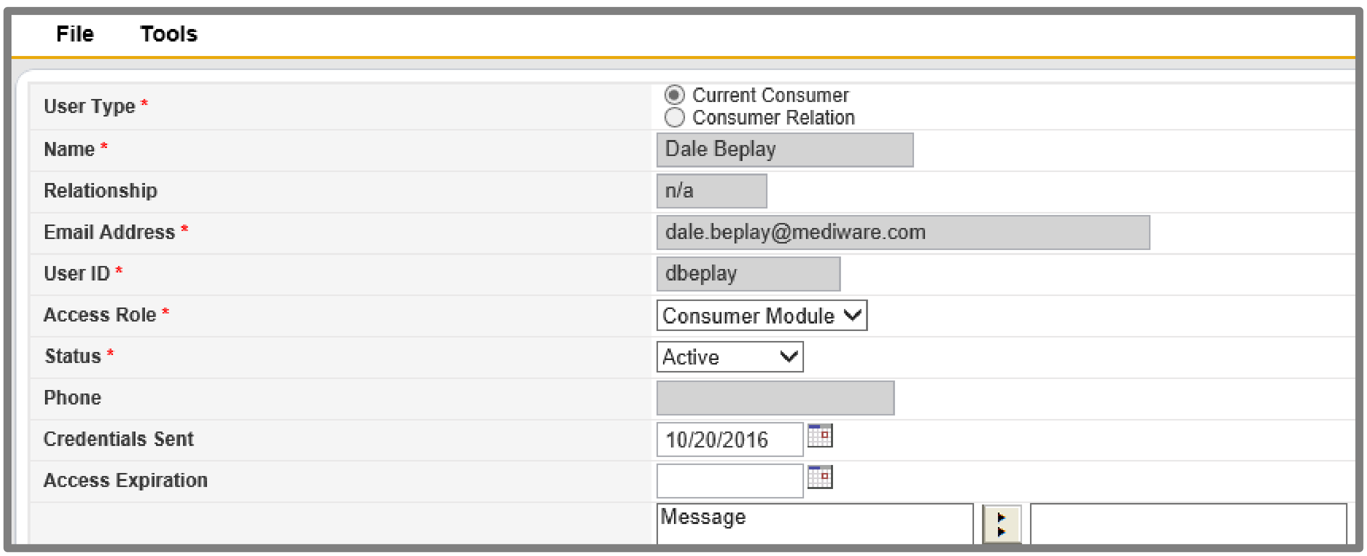
The **DD Registry** tab is used to track all consumers waiting on the DD Registry wait list.



DD Registry Record

Consumer Module for the DD Registry

The **Consumer Module** tab is used to grant the consumer and or guardian access to the **Consumer Module** application. A representative for each consumer on the DD Registry waitlist is required to log in to the **Consumer Module** and complete an annual *DD Registration and Review* form.



Consumer Module Record

Practice Exercise

1. Using your Test Consumer, go to the **Medications** tab and add a medication. Set the **start date** but do not set an end date' then from the **File** menu, click **Save and Close**.

Chapter 5 Quiz

1. True or False? A Consumer can be involved with multiple Programs at the same time.

2. If you want to see all the Providers Authorized to serve the consumer, what tab do you go to?

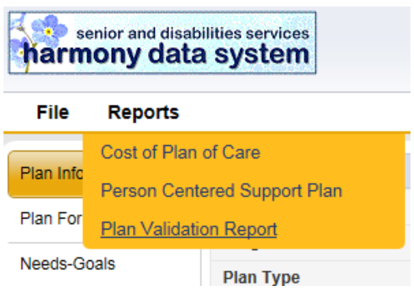
3. Who maintains the demographic information for the Consumer?
    a. SDS Program Assistants
    b. Care Coordinator
    c. Consumer must contact SDS

Chapter 6 | Reports

Reports File Menu

When users click the **Reports** menu a list of reports will display based on the role of the user.

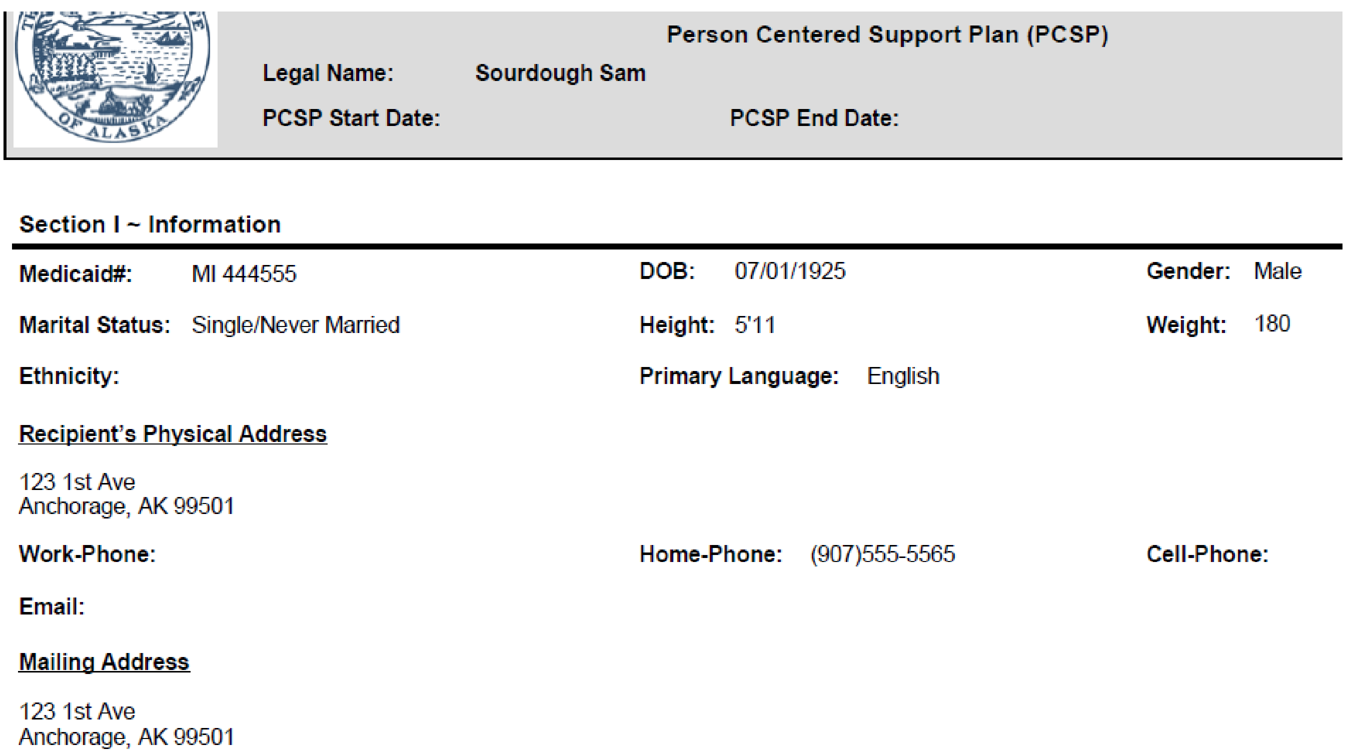
1. Select the report from the list and it will open in a new window or tab. Based on how the report is configured users will be able run the report only or will be able to run the report and then save the report to a note record or print it for signatures.



Consumer Plan Reports

The Person Centered Support Plan (formally the Plan of Care) is a report. The data that prints on the report is gathered from many locations in the Consumers Record.

The Cost of Plan of Care is an overview sheet, listing all the providers and the amount of services being requested. The report also serves to inform consumers of the total cost of the Support Plan



Person Centered Support Plan (PCSP)

Legal Name: **Sourdough Sam**

PCSP Start Date: **PCSP End Date:**

Section I ~ Information

Medicaid#: MI 444555 **DOB:** 07/01/1925 **Gender:** Male

Marital Status: Single/Never Married **Height:** 5'11 **Weight:** 180

Ethnicity: **Primary Language:** English

Recipient's Physical Address

123 1st Ave
Anchorage, AK 99501

Work-Phone: **Home-Phone:** (907)555-5565 **Cell-Phone:**

Email:

Mailing Address

123 1st Ave
Anchorage, AK 99501

Person Centered Support Plan Report

Chapter 7 | Notes

Introduction

Notes are used to communicate within Harmony. They can be created by the system (Harmony Application) automatically or you can create them yourself. A note allows the attachment of files (PDF, Microsoft Word® or Microsoft Excel®, images in jpeg, gif and tif formats).

A note can be routed to individual workers, providers and outside agencies that use Harmony (not in the system yet) as long as they are associated (have access to) the consumer. Notes that have been routed to you or that you have completed BUT HAVE NOT BEEN READ appear on the **My Harmony** Consumer section.

There are 2 types of Notes:

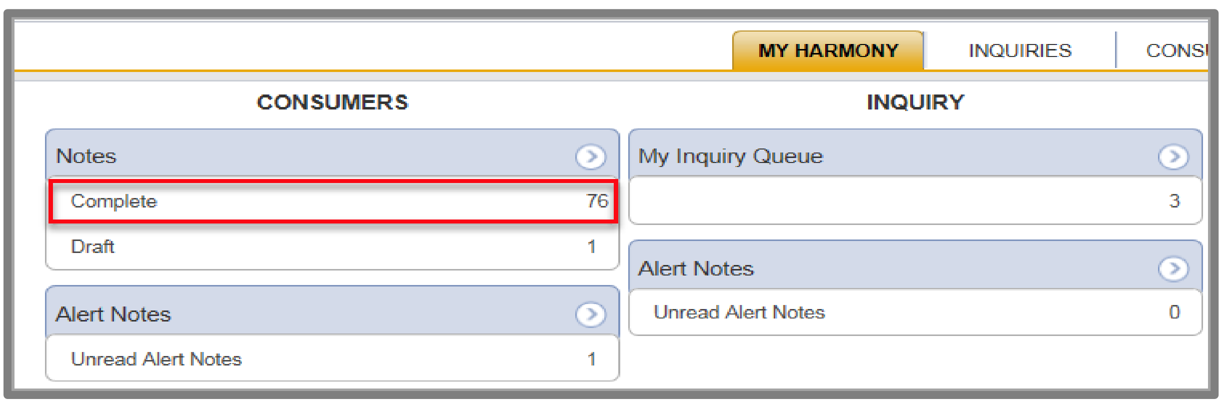
1. Consumer notes located through the Notes Tab on the consumers record
2. Plan or Inquiry notes located through the subpage of the Plan or Inquiry. Plan Notes will not appear in the consumer record Notes Tab. Inquiry notes will be linked to the Consumer Notes Tab.

Open a Note from My Harmony

Notes are opened within the record, or from your **My Harmony**. Notes that you are creating are listed as **Draft** notes, Notes you have completed and are awaiting action from SDS are listed as **Pending** and notes that have been acted on by SDS are displayed as **Complete**.

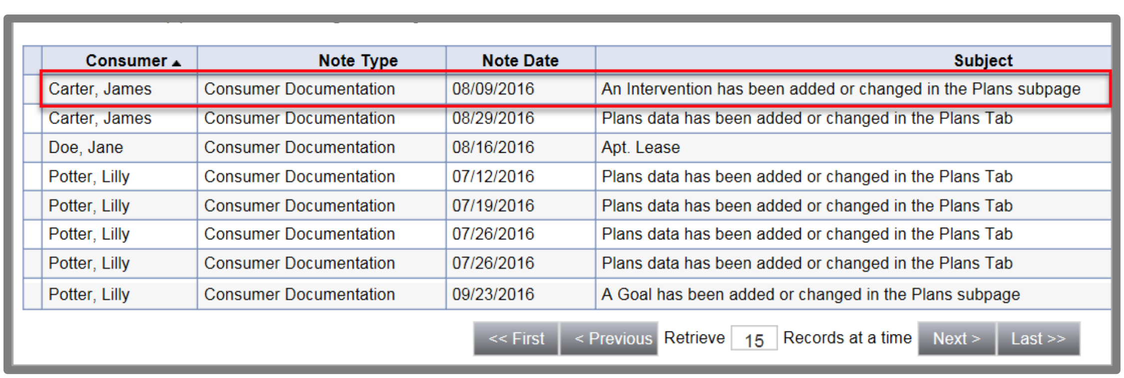
1. To open an unread consumer note, from **My Harmony**, in the applicable section, click anywhere in the **Complete** row.

   *If you do not have any unread Notes you will not see this Panel on your **My Harmony** page.



Consumer Notes

2. A list of notes is displayed. To open one of the notes, click anywhere in the note's row.

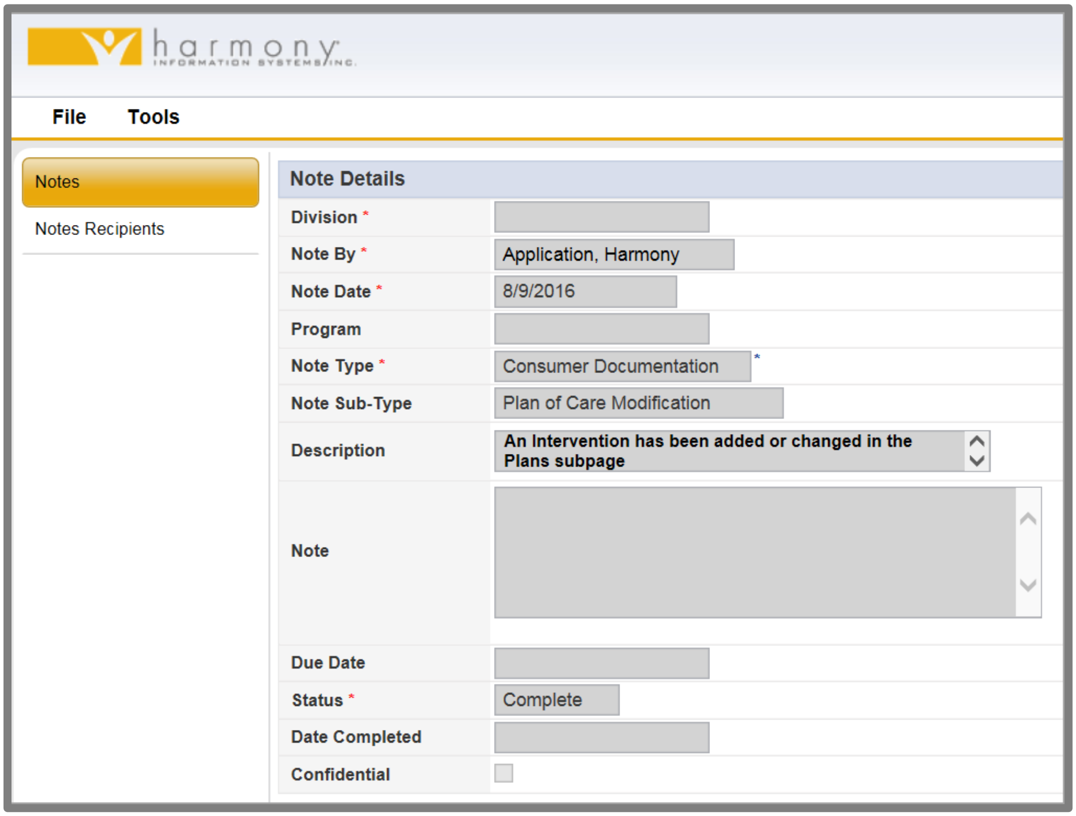


Consumer ▲	Note Type	Note Date	Subject
Carter, James	Consumer Documentation	08/09/2016	An Intervention has been added or changed in the Plans subpage
Carter, James	Consumer Documentation	08/29/2016	Plans data has been added or changed in the Plans Tab
Doe, Jane	Consumer Documentation	08/16/2016	Apt. Lease
Potter, Lilly	Consumer Documentation	07/12/2016	Plans data has been added or changed in the Plans Tab
Potter, Lilly	Consumer Documentation	07/19/2016	Plans data has been added or changed in the Plans Tab
Potter, Lilly	Consumer Documentation	07/26/2016	Plans data has been added or changed in the Plans Tab
Potter, Lilly	Consumer Documentation	07/26/2016	Plans data has been added or changed in the Plans Tab
Potter, Lilly	Consumer Documentation	09/23/2016	A Goal has been added or changed in the Plans subpage

<< First < Previous Retrieve 15 Records at a time Next > Last >>

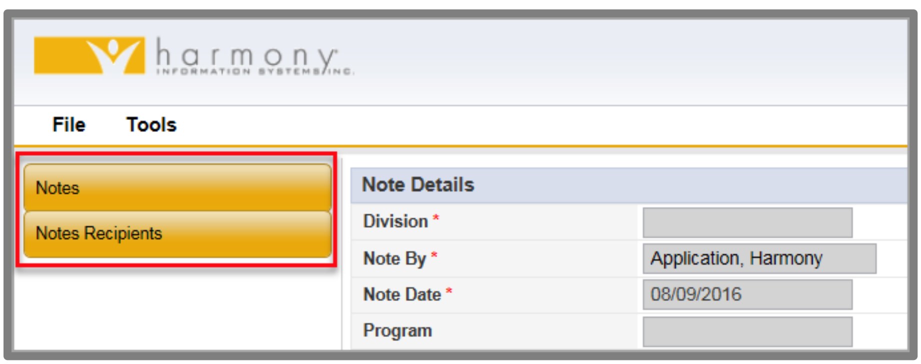
List of Plan Notes

3. More information that is included in the note is displayed.



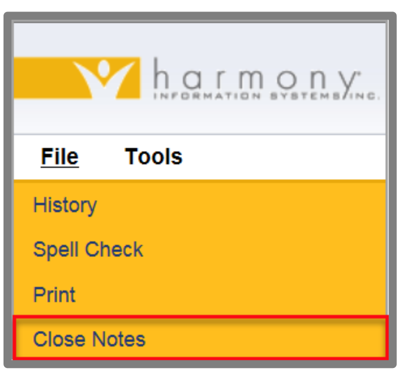
Note Details

4. Some notes include another menu of subpages that are displayed on the left side of the screen.



Note Sub-Menu

5. To close the note, click **File – Close Notes**.



Note File Menu

Parts of a Note

Each note includes several fields, however, the **Note Type** and a **Note Sub-Type** fields determine where a note is routed, so it's important to select the correct options when you create a note.

Note

A full description of **Note Types** and **Note Sub-Types** are found in the *J02 Note Type and Subtype* job aid.

Note Type

A **Note Type** describes the note's main subject. A common **Note Type** example is **Access to Consumer Record**, which is used when providers have a potential new consumer and they want to request access to the consumer record from SDS. Another **Note Type** you may frequently see is **Consumer Documentation**, where a completed form or medical documentation is attached.

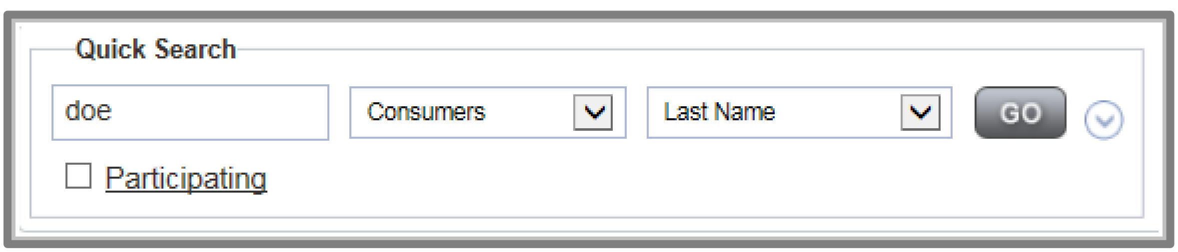
Note Sub-Type

The **Note Sub-Type** provides more detail about the note's subject and helps to categorize it for routing. Some time you will not have any sub-types to select from.

Create a Note

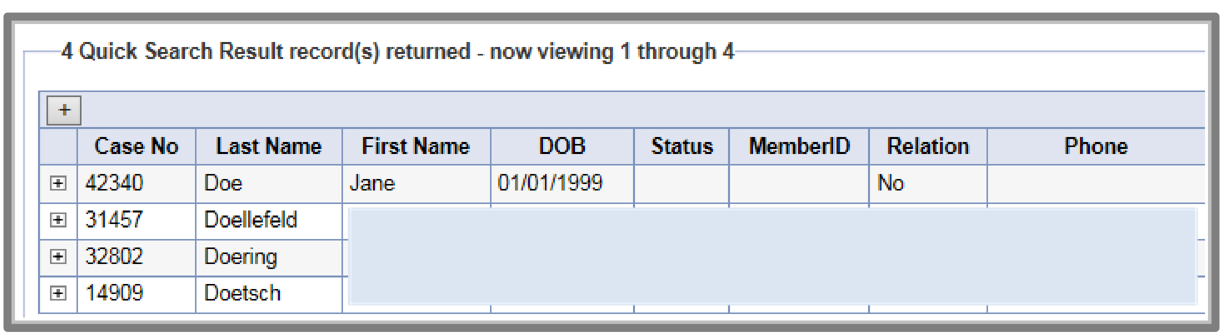
To create a note, follow the steps below.

1. Search for the consumer record.
    a. Click the **Consumers** chapter.
    b. Enter the **Quick Search** information and then click **Go**.



Quick search screen

2. Click the record line to open it.

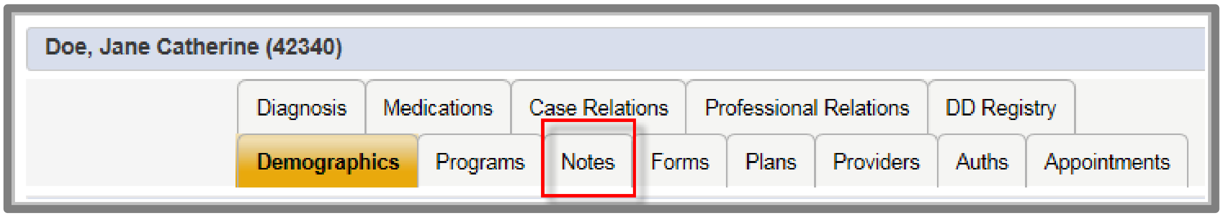


4 Quick Search Result record(s) returned - now viewing 1 through 4

Case No	Last Name	First Name	DOB	Status	MemberID	Relation	Phone
42340	Doe	Jane	01/01/1999			No	
31457	Doellefeld						
32802	Doering						
14909	Doetsch						

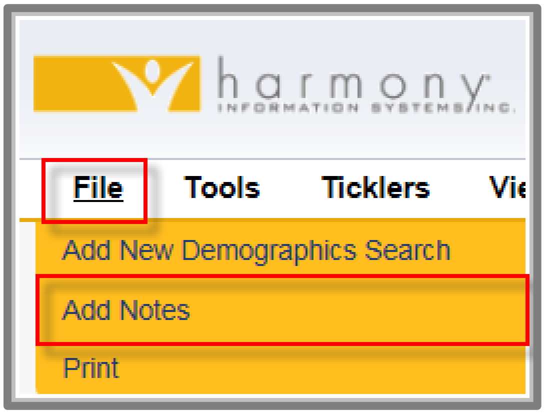
Consumer list

3. Click the **Notes** tab.



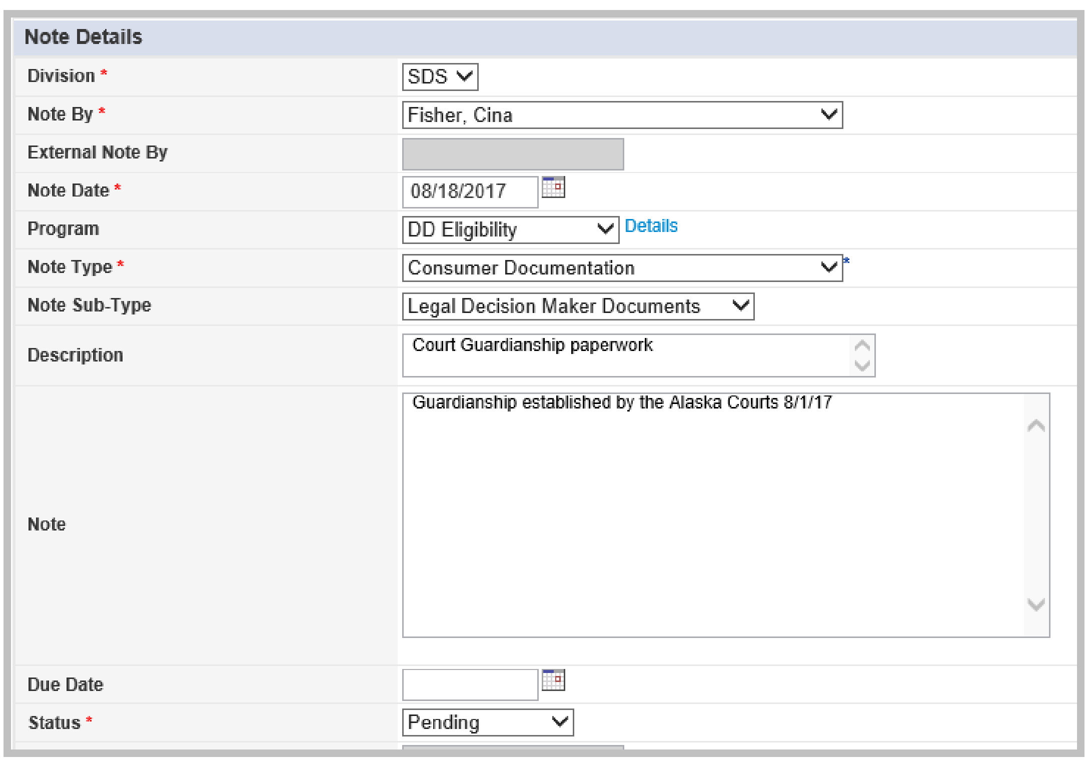
Notes tab in consumer record

4. Point to the **File** menu and then select **Add Notes**.



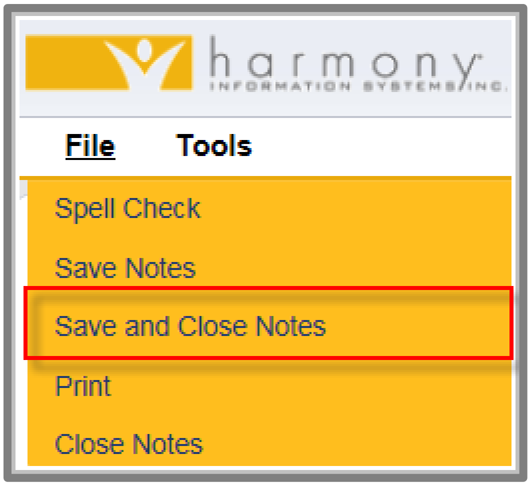
Note File Menu

a. The **Note Details** screen is displayed. Some fields have a red asterisk (*) next to them. This means they are required and you must complete them before saving the record. Fields that don't have a red asterisk are optional; however, it's always a good idea to enter as much information as you have available.



Note Details

5. Once you've entered all the information into the note, point to the **File** menu and then click **Save and Close Notes**.



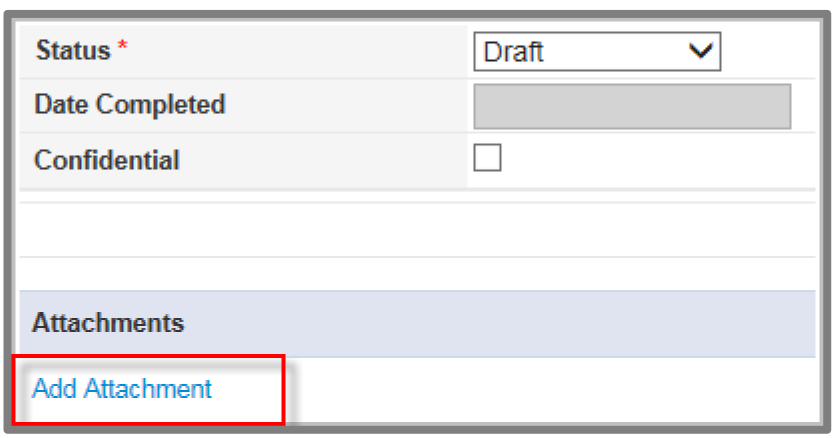
Note File Menu

Attach a File to a Note

An attachment is anything that is in an electronic form, such as a letter created in Microsoft Word® or a signed application or a nurse's handwritten note that has been scanned into an electronic format. Notes are the way that files are routed to other Harmony users or the way to attach supportive documentation to a plan or consumers record.

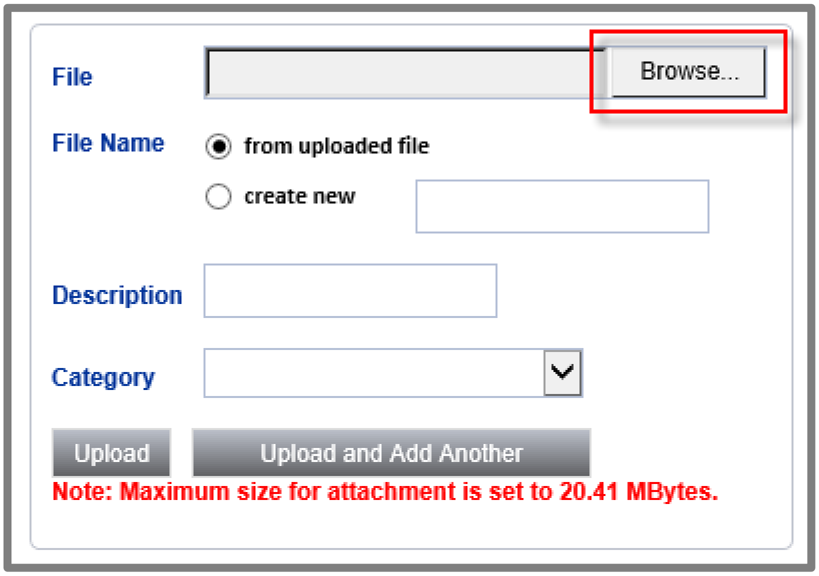
The steps for attaching a file to a note begin with creating the note, described in the *Create a Note* section. To attach a file, before saving the note, follow the steps below:

1. While your Note is still open
    c. Scroll down to the **Attachments** section and then click **Add Attachment**.



Note Add Attachment Section

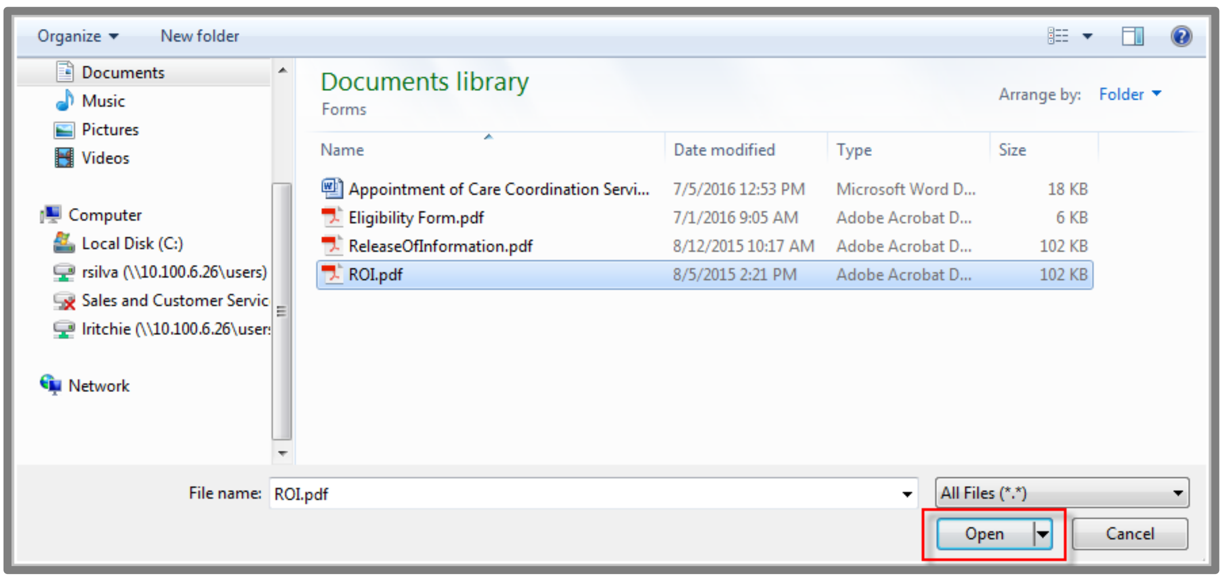
2. Click **Browse** to locate the file on your computer that you want to attach to the note.



It is no longer necessary to continue to use the SDS naming convention.

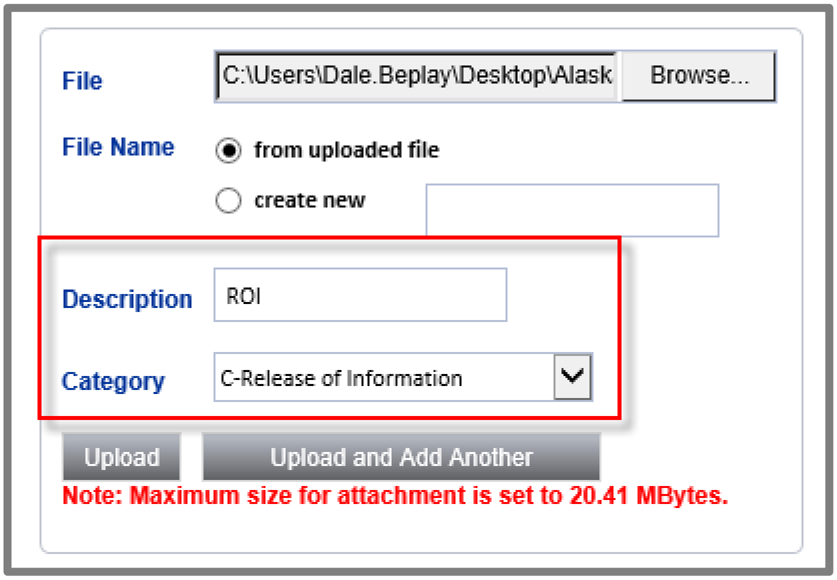
Note Browse Screen

3. Locate the file, select it and then click **Open**.
    d. In this example, the consumer's ROI has been signed and returned. The user has scanned it to create an electronic PDF file.



Note Browse Screen

4. In the **Description** field, type a brief description of the file(s).
4. Click **Category**.
    a. Select the appropriate **Category** based on the file being uploaded.
        i. "C-" means it's a consumer type document
        ii. "P-" means it's a provider certification document
    b. Leave blank if there are no matching categories.

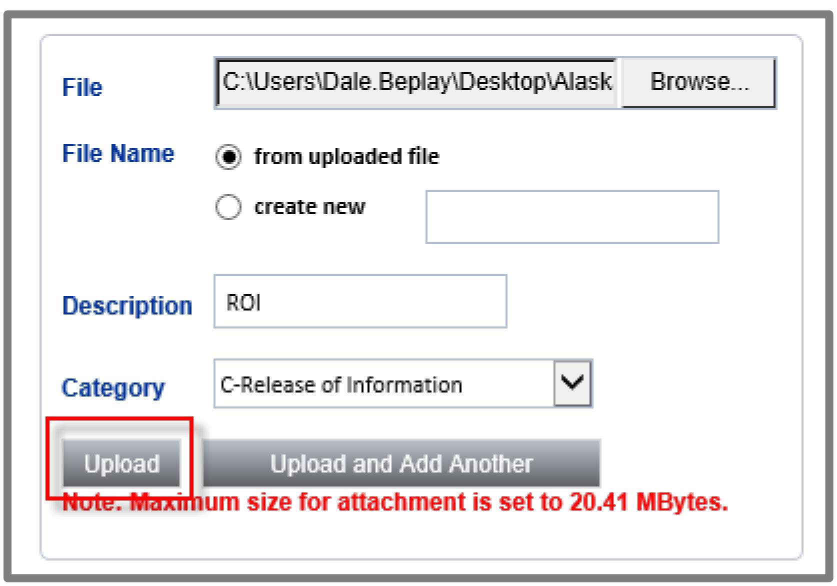


Note Browse Screen

Key Point

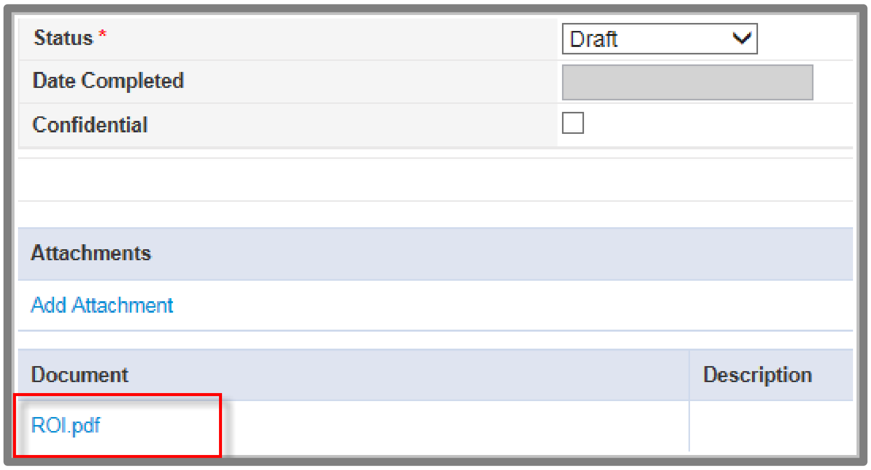
The note description is important! Over time, a record can include many notes, and if descriptions are missing or inaccurate, the note needs to be opened to see what the attachment is. When a description is included, it is displayed on the notes list, so you can easily scan the list to find what you're looking for.

5. Click **Upload**
    b. To upload the file and then upload another file to the note, click **Upload and Add Another**
    c. Only 5 attachments of 20.41 Mbytes each can be attached to one note. No more than 100 MB per Note.



Note Browse Screen

6. A link to the file is displayed on the note.



Note Document Section

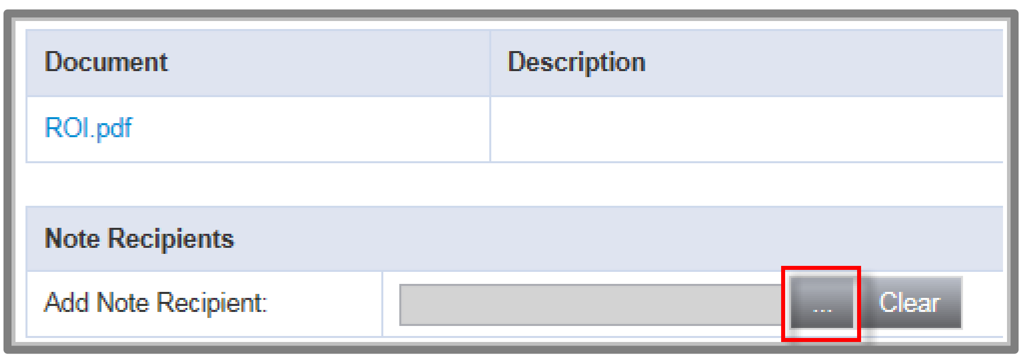
7. To display the file, click the link.

Route the Note to Another Harmony User

Harmony allows you to route the note to one or more users. When the user receives the note, it is displayed on their **My Harmony** chapter, in the **Consumers**, **Providers** or **Inquiry Notes** section.

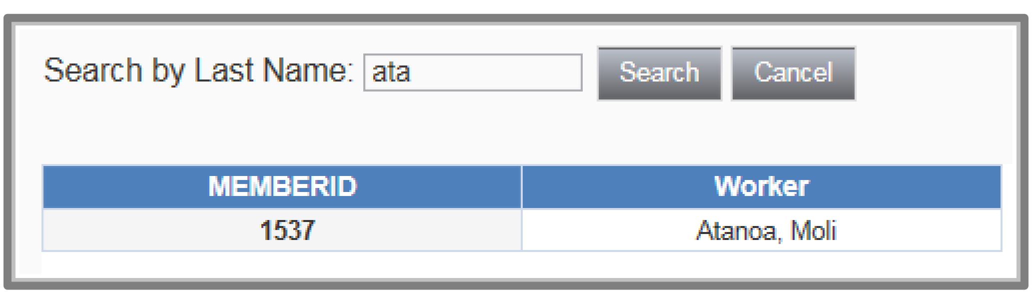
The steps for routing a note to another Harmony user begins with creating the note, described in *Create a Note* above. Before saving the note, follow the steps below:

5. Scroll down to the **Note Recipients** section and then click ... .



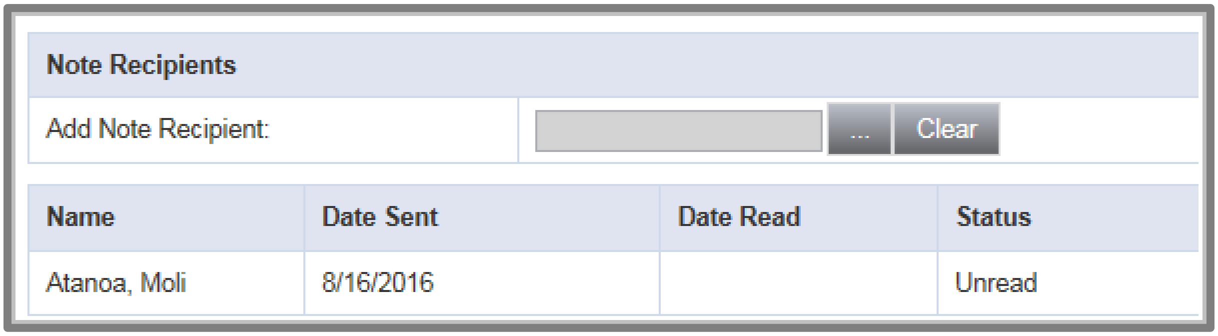
Note Recipient Search

6. Type the last name (or the first few letters) of the Harmony user in the **Search by Last Name** field and then click **Search**.
7. Select the name from the list.



Quick Search Screen Results

8. The Harmony user is added to the **Note Recipients** section.



Add Recipient

9. Repeat steps 1 – 4 to add additional note recipients.
10. Click File – Save and Close Notes.

Key Point

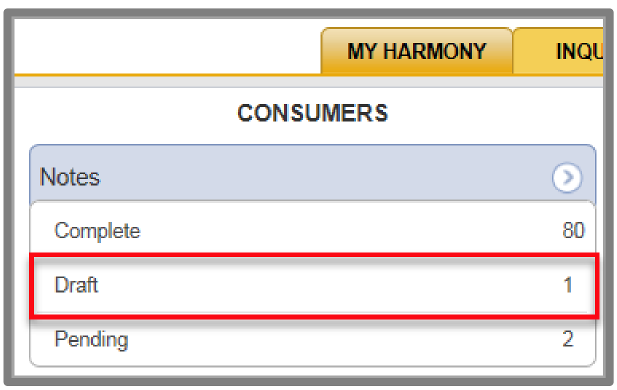
When the recipient opens the note, the status is automatically changed to **Read**.

It is not necessary to route a note to a specific user. Most notes will be reviewed based on the program and status they are in. **Avoid routing to a specific Harmony user unless necessary**.

Edit a Note

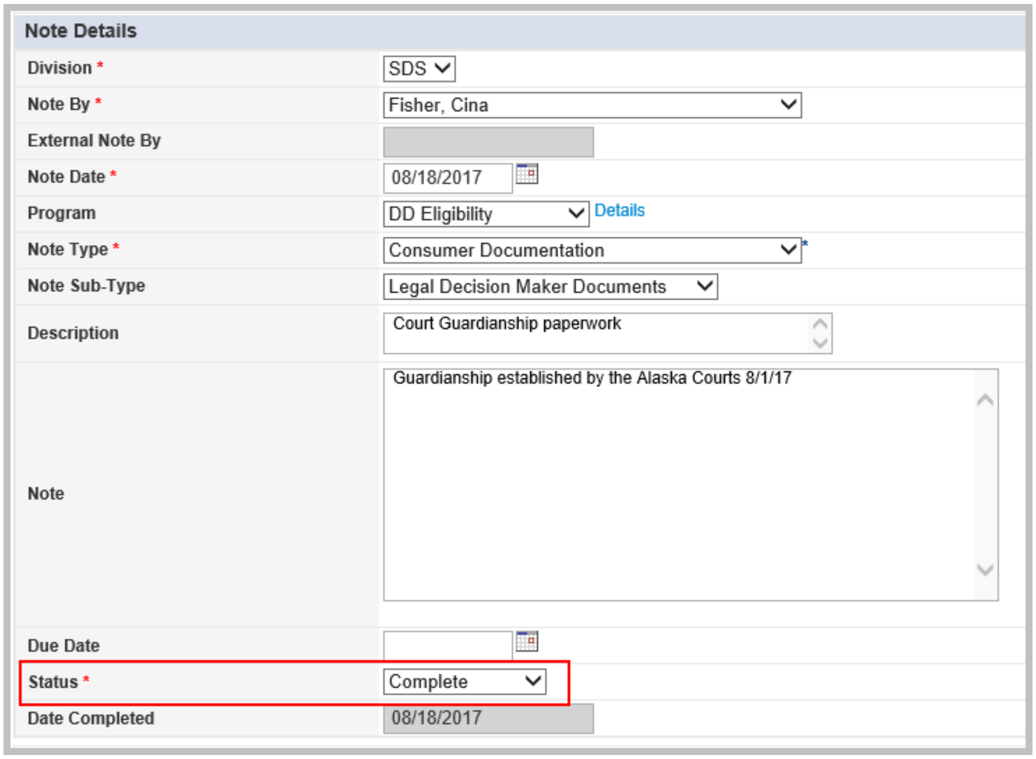
You can edit notes you created that are in a **Draft** status.

1. To open the note, go to **My Harmony** and then click the **Draft** note row in the relevant section.



My Harmony Draft Consumer Notes

2. Click the note you want to edit. If the list is long, search for the note. For more information, see *Search for Records* previously explained.
3. Make additions to the note, as needed and change the **Status** to **Complete**.
    a. You cannot change the original note.

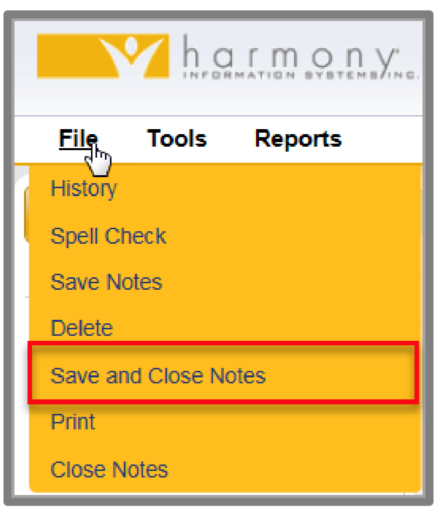


Note Details

Key Point

When the **Note Status** is **Complete**, the fields are dimmed and you cannot edit them.

4. Click **File – Save and Close Notes**.

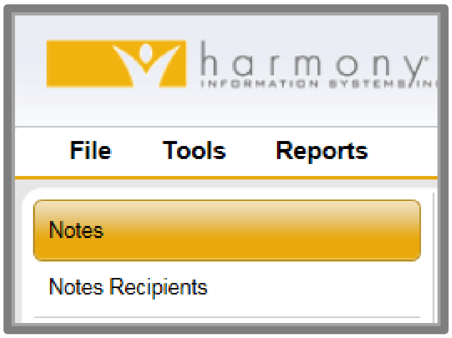


File Menu

Route a Note to another Person

You can route a note to another person in a different way.

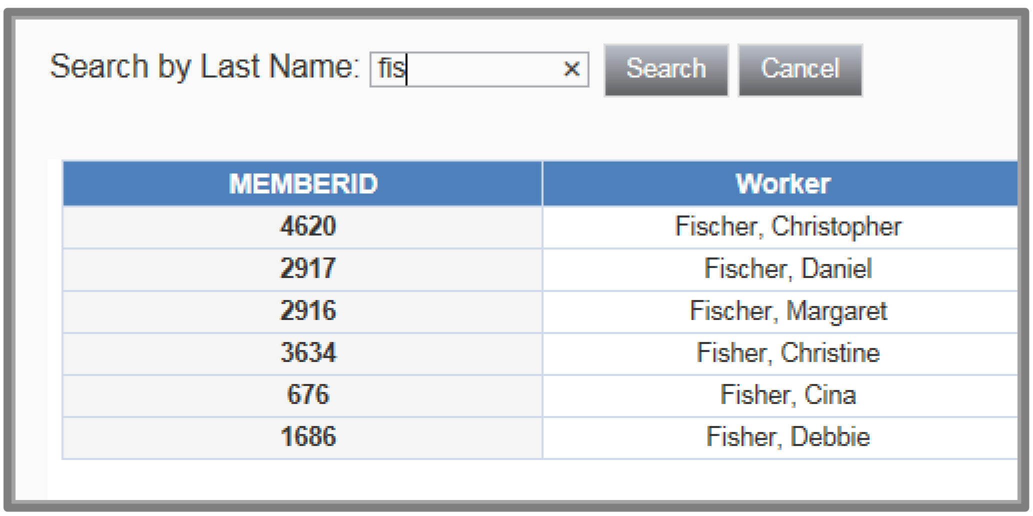
1. Create a note or select an existing note.
2. Before you save the note, do one of the following:
    a. Click **Notes Recipients** from the sub-menu.



File Menu

    b. In the **Note Recipients** section of the note, click ... .

3. Type the first few letters of the person's last name and then click **Search**.
4. Click the name of the person you want to route the note to.

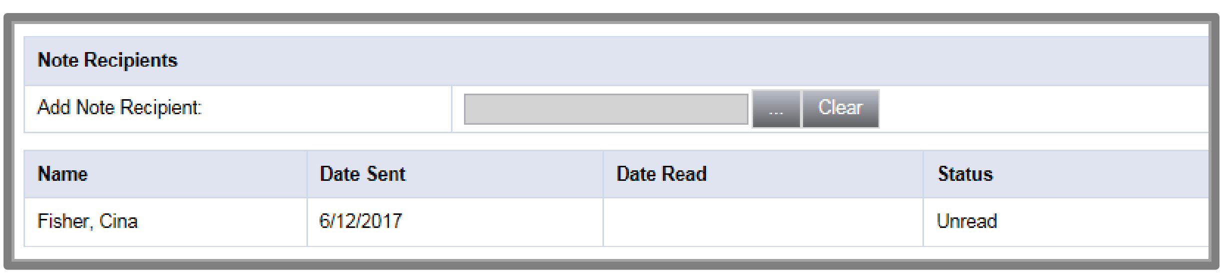

Search by Last Name: fis Search Cancel

MEMBERID	Worker
4620	Fischer, Christopher
2917	Fischer, Daniel
2916	Fischer, Margaret
3634	Fisher, Christine
676	Fisher, Cina
1686	Fisher, Debbie

Note Recipient Search Results

    a. The name is displayed in the note.

5. Add additional recipients, if needed.


Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status
Fisher, Cina	6/12/2017		Unread

Note Recipient Added

6. Do one of the following:

a. Click **File - Save Notes** to save the note and stay on the screen.

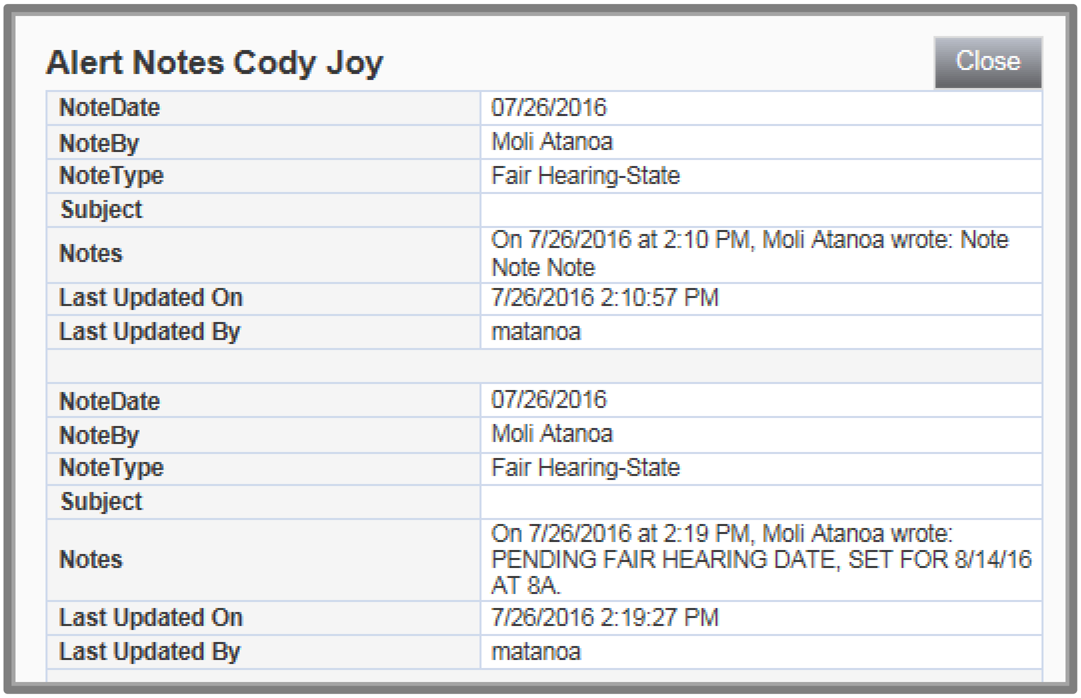
b. Click **File - Save and Close Notes** to save the note and close the screen.

Key Point

When a note is sent to a recipient, it is displayed on their **My Harmony** screen, in the **Unread Notes** section.

Alert Notes

Alert Notes are different from other notes you see in Harmony. An alert note is displayed every time the record is opened, and as soon as it is opened.



Alert Notes Cody Joy

Close

NoteDate	07/26/2016
NoteBy	Moli Atanoa
NoteType	Fair Hearing-State
Subject	
Notes	On 7/26/2016 at 2:10 PM, Moli Atanoa wrote: Note Note Note
Last Updated On	7/26/2016 2:10:57 PM
Last Updated By	matanoa
NoteDate	07/26/2016
NoteBy	Moli Atanoa
NoteType	Fair Hearing-State
Subject	
Notes	On 7/26/2016 at 2:19 PM, Moli Atanoa wrote: PENDING FAIR HEARING DATE, SET FOR 8/14/16 AT 8A.
Last Updated On	7/26/2016 2:19:27 PM
Last Updated By	matanoa

Alert Note

Key Point

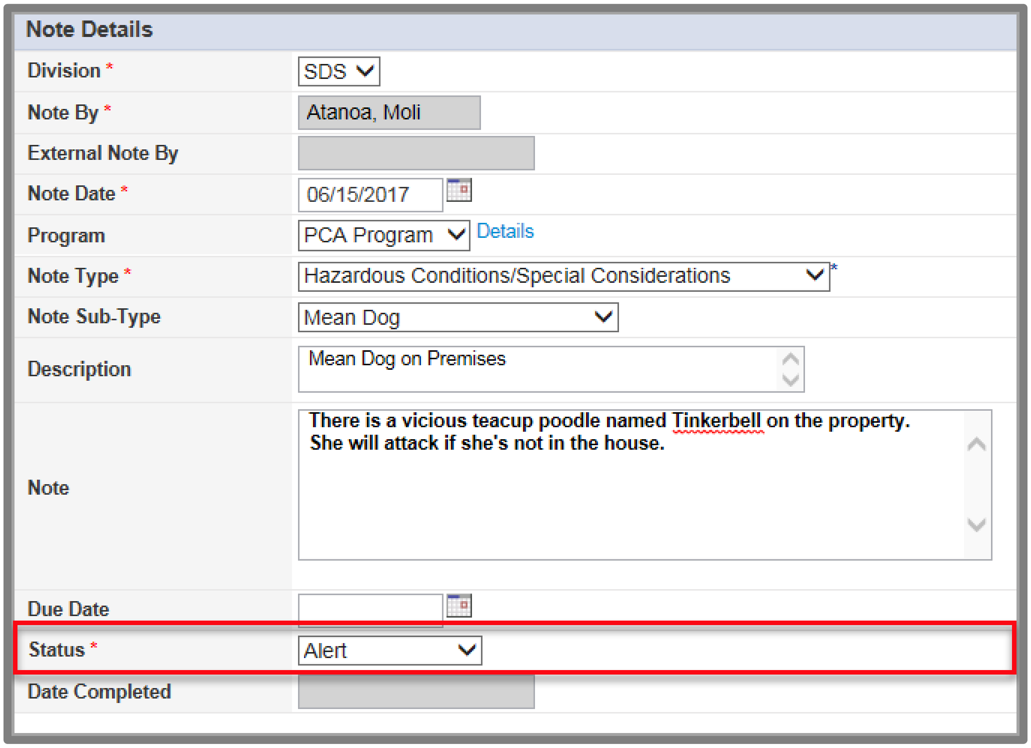
Here are two situations where a user should create an alert note:

- If there are known hazardous conditions at the consumer's residence, an alert note is created to warn workers who may visit the home.
- If there are imminent enforcement actions being taken against a provider based on a violation or critical incident.

Create an Alert Note

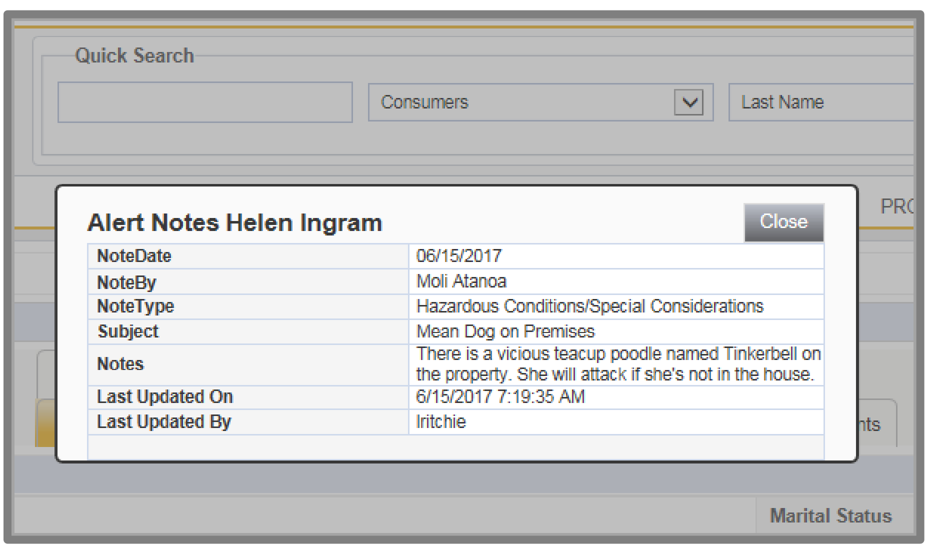
An Alert Note is created in the same way a regular note is created, however, before the note is saved, the **Status** is changed to **Alert**. For information about creating a note, see *Create a Note*, beginning on page 36.

1. When you are finished with the alert note, click **File – Save and Close Notes**.



Alert Note

2. When the consumer record is opened, the alert note is displayed. To close it, click **Close**.



Alert Note

Chapter 7 Quiz

1. There are 2 kinds of notes in Harmony. Consumer Notes and _________________ Notes.

2. There are two ways Notes are created. The ____________________ can create them or __________________ create them. (hint: look to the beginning of this chapter)

3. You can route notes to other Harmony users with access to the consumer. Yes or No?

4. How many attachments can you include in one Note?

5. Is there a limit to how many notes you can add to a plan or consumer? Yes or No?

Chapter 8 | Ticklers

Introduction

A tickler is a reminder to do something, such as submit a renewal Application or a Support Plan for a consumer. Ticklers can also be part of Workflow Wizards, which you will learn about later. You will use ticklers a lot in your daily work. Harmony creates ticklers automatically, and you can also create them yourself.

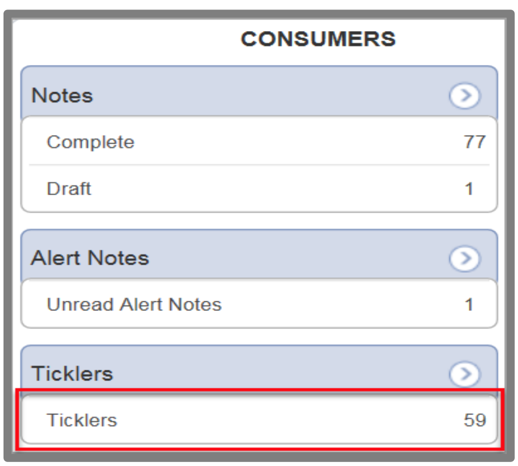
Learning Objectives…

- ✓ Locate and open a tickler
- ✓ Describe how to act on a tickler
- ✓ Identify how to dismiss a tickler
- ✓ Explain how to reassign a tickler to someone else

Locate and Open a Tickler

Ticklers are displayed on **My Harmony**. You may receive several ticklers throughout the day, so it is important to check often for new ones. The screenshot below shows that there are 59 consumer ticklers.

1. From **My Harmony**, locate the ticklers under either the **Consumers** column. In this example, we are working with a consumer tickler.
2. Click anywhere in the ticklers row to display a list of consumer ticklers.



Consumer Ticklers

3. To open one of the ticklers, click anywhere in the row.

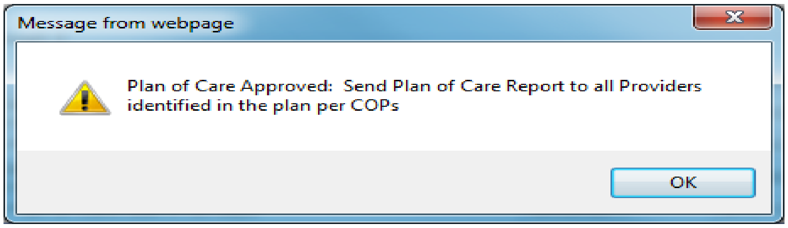
4 Ticklers record(s) returned - now viewing 1 through 4

CaseNo	Consumer Name	Tickler Name	Date Created	Date Due	Date Completed	Status	
61624	Sam, Sourdough	Plan of Care Approved: Send Plan of Care Report to all Providers identified in the plan per COPs	09/21/2017	09/21/2017		New	▸
61624	Sam, Sourdough	Renewal Plan of Care due in 30 days	09/21/2017	07/23/2017		New	▸
61624	Sam, Sourdough	Plan of Care Approved: Send Plan of Care Report to all Providers identified in the plan per COPs	09/29/2017	09/29/2017		New	▸
61624	Sam, Sourdough	Renewal Plan of Care due in 30 days	09/29/2017	07/31/2017		New	▸

<< First < Previous Retrieve 15 Records at a time Next > Last >>

List of Consumer Ticklers

a. Details about the tickler or reminder are displayed.



Tickler Description

b. A Tickler can also send you directly to complete an action on a consumer like beginning the renewal application.

The SDS Harmony system has automatically configured reminders (Ticklers) to help you meet the regulatory timelines. When the system is 1st initiated or "Goes-Live" the reminders are not programed. As you complete the details and forms for your current client base they will begin to show in your My Harmony Ticklers when needed.

Act on a Tickler

To act on a tickler, click the tickler you want to open.

1. If there is only one task within the tickler, the screen displays the task that needs to be completed.
2. Sometimes a detail box appears telling you what needs to be done. You will need to View Consumers Record (through the flyout menu) and complete the task, then return to the tickler to either "Cancel or "Complete" it.
3. If the Tickler was generated as part of a Workflow Wizard, there may be more than one task listed on the Workflow Wizard menu. If so, click the first task and complete it and then move on to the next task.

Cancel a Tickler

Most ticklers are created automatically in Harmony. You may have already done the tickler action (task), but the tickler will still be created. In this case, you can cancel the tickler.

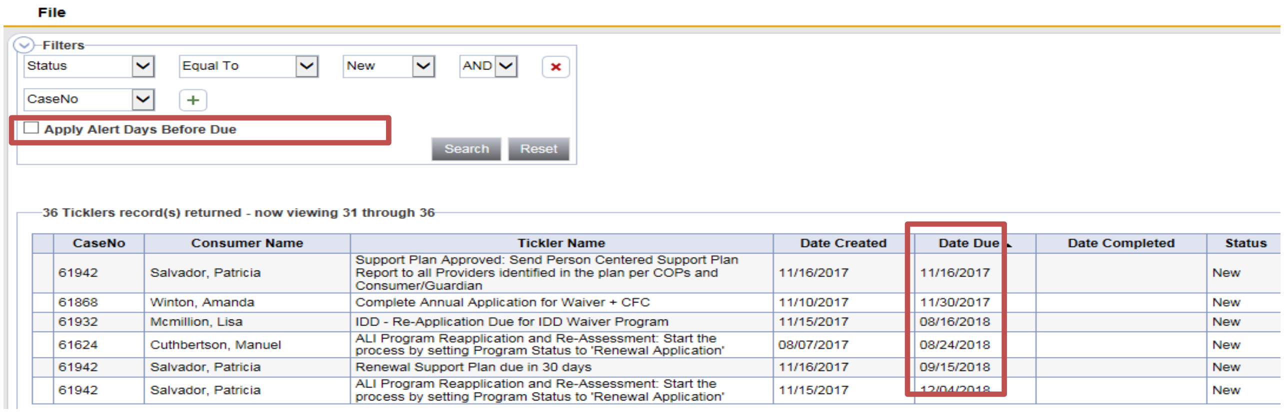
1. Follow the steps for Locate & *Open a Tickler*.
2. On the **Tickler** menu, point to the right-facing arrow known as a "Flyout Menu" to display a menu of actions and then click **Cancel**.

Key Point

If you cancel a tickler this does not cancel the need to complete the task if it has not been done. Ticklers are reminders. Like alarms, just because you turn them off doesn't mean you don't have to get up!

View Future Ticklers

If you are looking for ticklers that have a due date in the future, uncheck the **Apply Alert Days Before Due** and click **Search**. The list view page will refresh and present a list of the ticklers and their due dates.



CaseNo	Consumer Name	Tickler Name	Date Created	Date Due	Date Completed	Status
61942	Salvador, Patricia	Support Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs and Consumer/Guardian	11/16/2017	11/16/2017		New
61868	Winton, Amanda	Complete Annual Application for Waiver + CFC	11/10/2017	11/30/2017		New
61932	Mcmillion, Lisa	IDD - Re-Application Due for IDD Waiver Program	11/15/2017	08/16/2018		New
61624	Cuthbertson, Manuel	ALI Program Reapplication and Re-Assessment: Start the process by setting Program Status to 'Renewal Application'	08/07/2017	08/24/2018		New
61942	Salvador, Patricia	Renewal Support Plan due in 30 days	11/16/2017	09/15/2018		New
61942	Salvador, Patricia	ALI Program Reapplication and Re-Assessment: Start the process by setting Program Status to 'Renewal Application'	11/15/2017	12/04/2018		New

Apply Alert Days Before Due tickler list view

Chapter 9 | Workflow Wizards

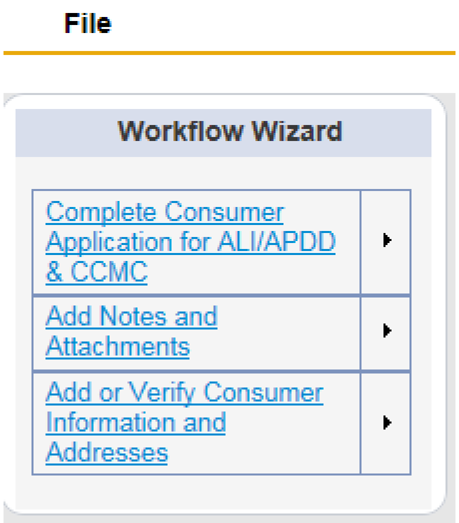
Introduction

A Workflow Wizard serves as a guide to remind you to do something or complete multiple steps in a process. A Workflow Wizard is a great reminder that certain tasks need to be done.

In the screenshot below, there are three tasks that need to be completed in the Workflow Wizard:

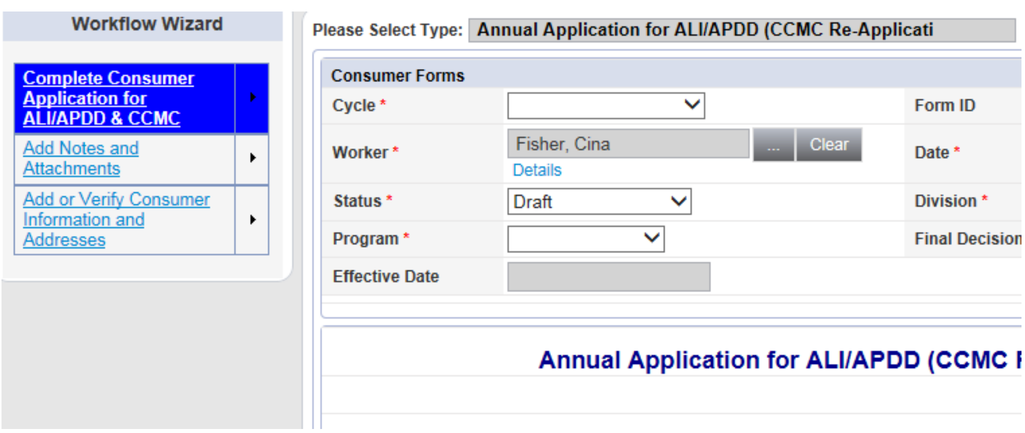
Complete a Workflow Wizard Task

1. To complete a Workflow Wizard task, click the link in the task.



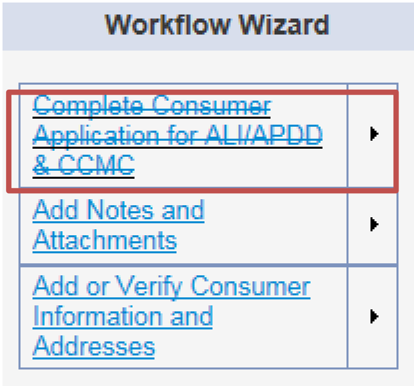
Workflow Wizard

2. When you click the link, Harmony brings you to the task to complete it.



Workflow Wizard Ticklers

3. Complete the task
1. Click **File – Save** (Not Save and Close)
    a. Since this task in the Workflow Wizard has been completed, it is displayed with a line through the link. This is also known as a strikethrough.



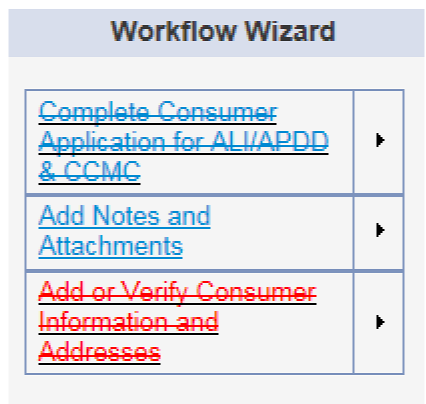
Workflow Wizard Tickler

The next task in the Workflow Wizard is to **Add Notes and Attachments**. Since the Application has not been signed yet, you can skip this task.

Cancel a Workflow Wizard Task

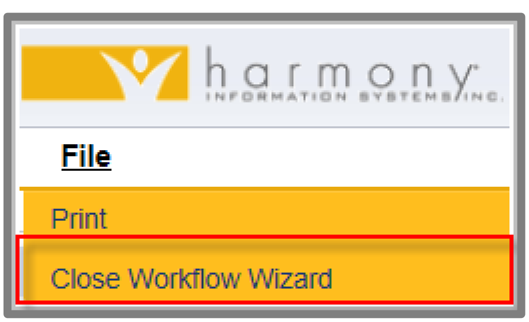
It's expected that you would have already verified the Consumers Addresses when you were creating the application.

1. You can cancel this task by pointing to the Fly-out Menu (right-facing arrow) in the task box and selecting Cancel.



A canceled Workflow Wizard task is displayed in red, with a line through it.

2. Click File – Close Workflow Wizard.

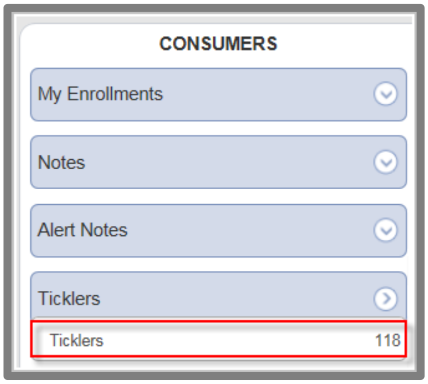


File Menu

Incomplete Workflow Wizard Tasks

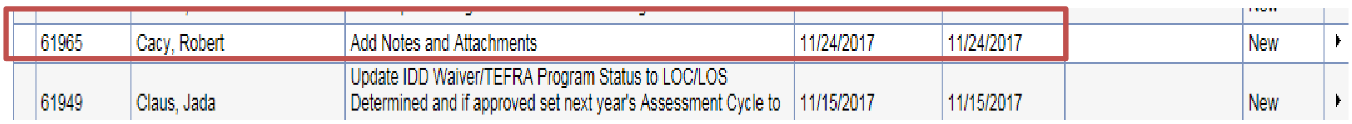
If you are unable to complete all the tasks in a Workflow Wizard, they are automatically added to your Ticklers list on **My Harmony**. In the screenshot below, we are looking for consumer ticklers.

1. Click anywhere in the Ticklers row on your **My Harmony** screen.



Consumer Ticklers

2. The Ticklers are that were not completed in the Work Flow Wizard are displayed now too.

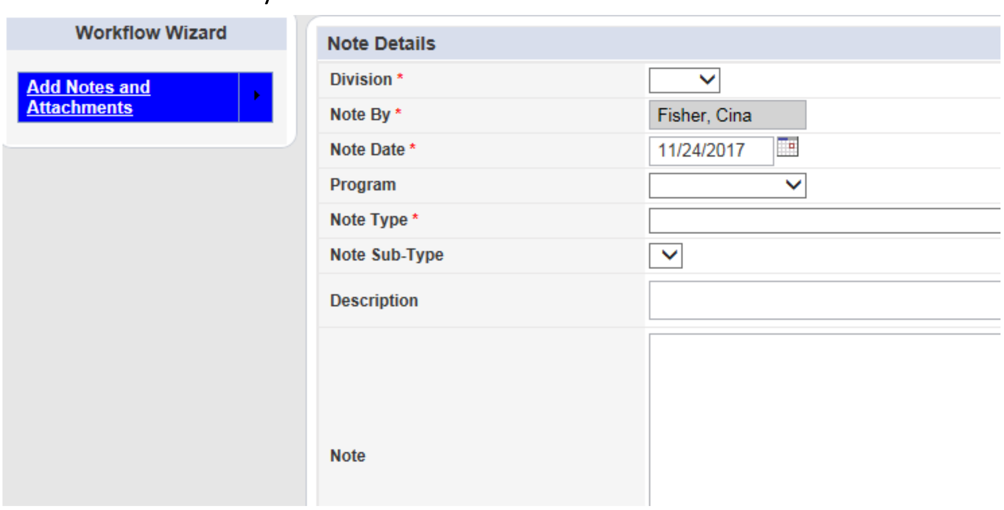


Tickles List

Note

You can sort each column in any List View Page by clicking the column heading, shaded in blue.

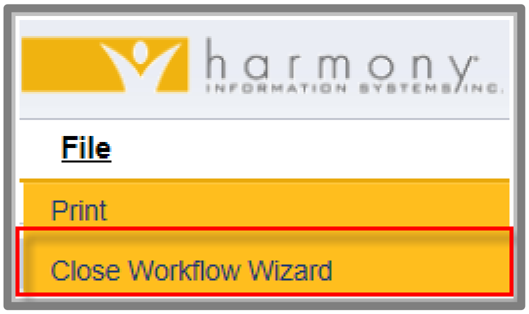
3. Click the Tickler record you want to work with and the WFW Reappears. If there were any additional tasks not yet completed, you could complete them here. Just remember to cancel them from your Ticklers list when you are done.



   a. The Tickler is displayed in blue on the left.

4. Complete the task.
5. Click **File – Save**.

6. Click File – Close Workflow Wizard.



File Menu

Now remember to cancel or compete the tickler off your list.

Chapter 9 Quiz

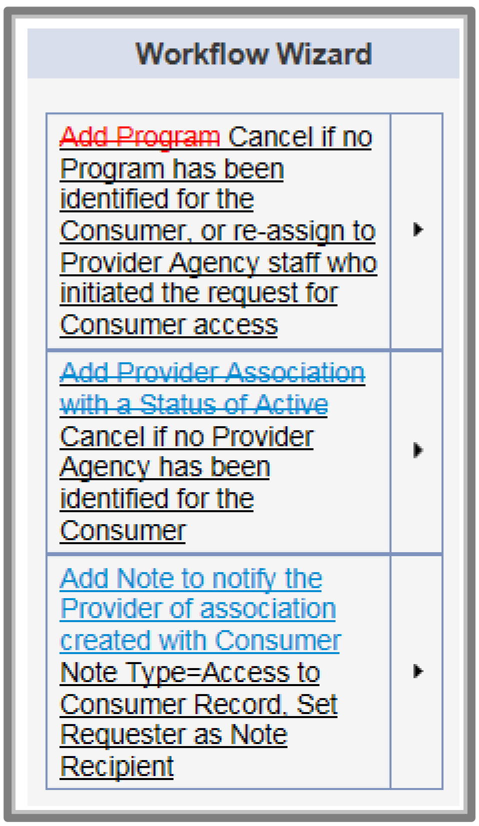
1. True or False? A Workflow Wizard usually includes one task.

2. In the screenshot below, there are three Workflow Wizard Tasks. Match each Task example (1, 2, 3) on the left to the correct Task Status (A, B, C) on the right.

1.

2.

3.



Task Status

A. Task has not been completed

B. Task has been cancelled

C. Task has been completed

3. If you are not able to complete a Workflow Wizard task, where can you find it?

Chapter 10 | Inquiry Records

Introduction

The Inquiry chapter serves as the "front door" for requests to work with a specific consumer. A Provider Inquiry Request must be made in order to initially associate the Care Coordinator with the person so a consumer program application can be made.

Learning Objectives…

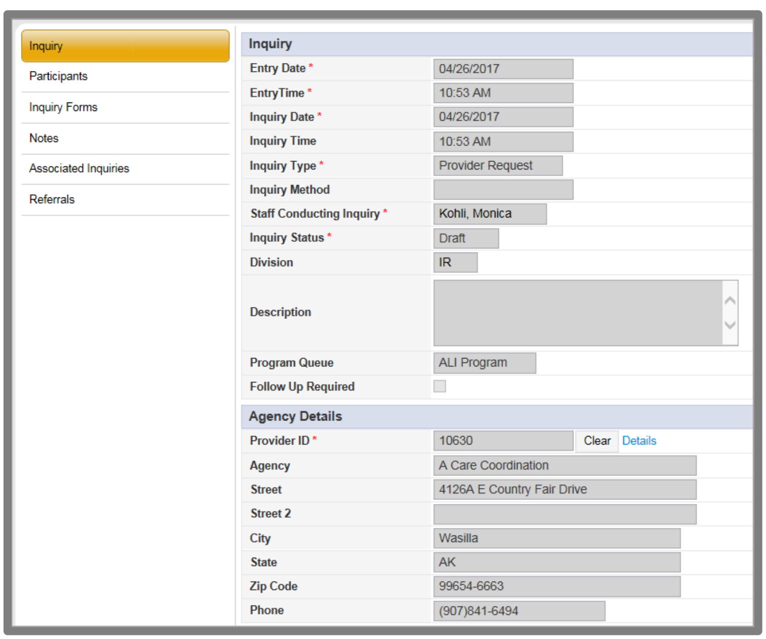
- ✓ Define the differences between a Consumer Record and an Inquiry Record
- ✓ Add an Inquiry Consumer Record
- ✓ Check the Inquiry record in
- ✓ Identify who has a record checked out

Inquiry Records

In Harmony, an Inquiry record looks like this. External workers will document the program their Person Seeking Supports is applying for and associate their Agency they work for.

Example – Provider request for consumer access

A Care Coordinator has a potential new consumer, so they need access to Lilly Potter's record. The CC requests access by completing an inquiry, which is sent to SDS.



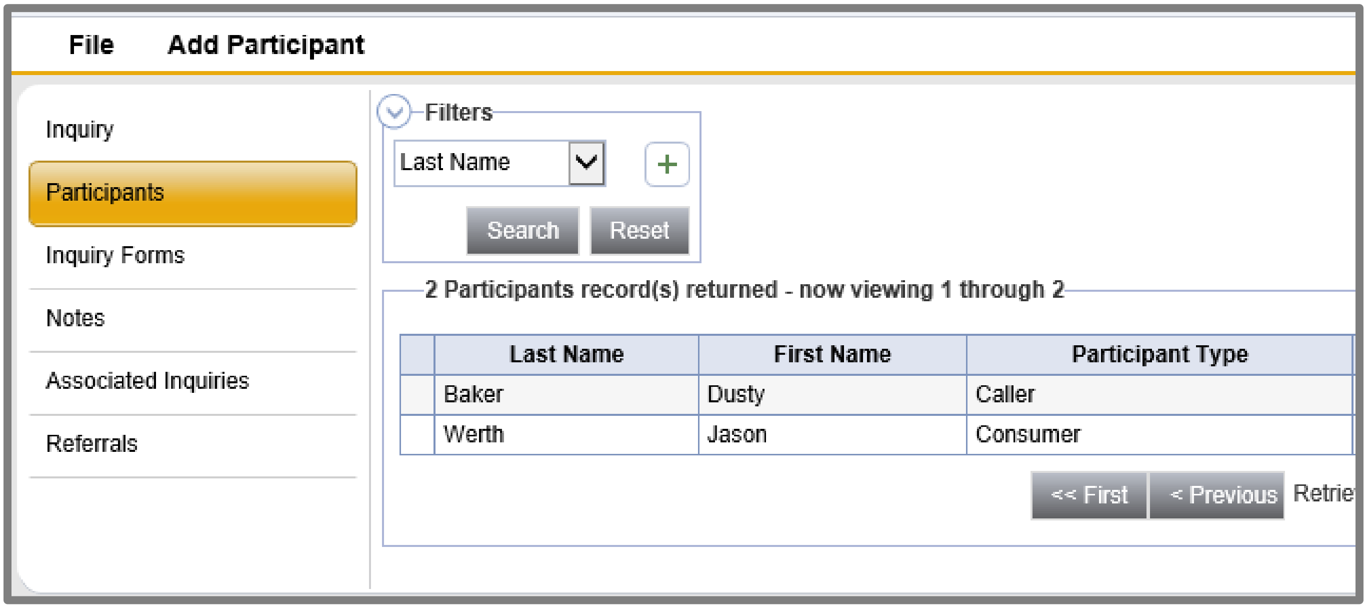
Inquiry
Participants
Inquiry Forms
Notes
Associated Inquiries
Referrals

Inquiry	
Entry Date *	04/26/2017
EntryTime *	10:53 AM
Inquiry Date *	04/26/2017
Inquiry Time	10:53 AM
Inquiry Type *	Provider Request
Inquiry Method	
Staff Conducting Inquiry *	Kohli, Monica
Inquiry Status *	Draft
Division	IR
Description	
Program Queue	ALI Program
Follow Up Required	
Agency Details	
Provider ID *	10630 Clear Details
Agency	A Care Coordination
Street	4126A E Country Fair Drive
Street 2	
City	Wasilla
State	AK
Zip Code	99654-6663
Phone	(907)841-6494

Inquiry Record

Participants

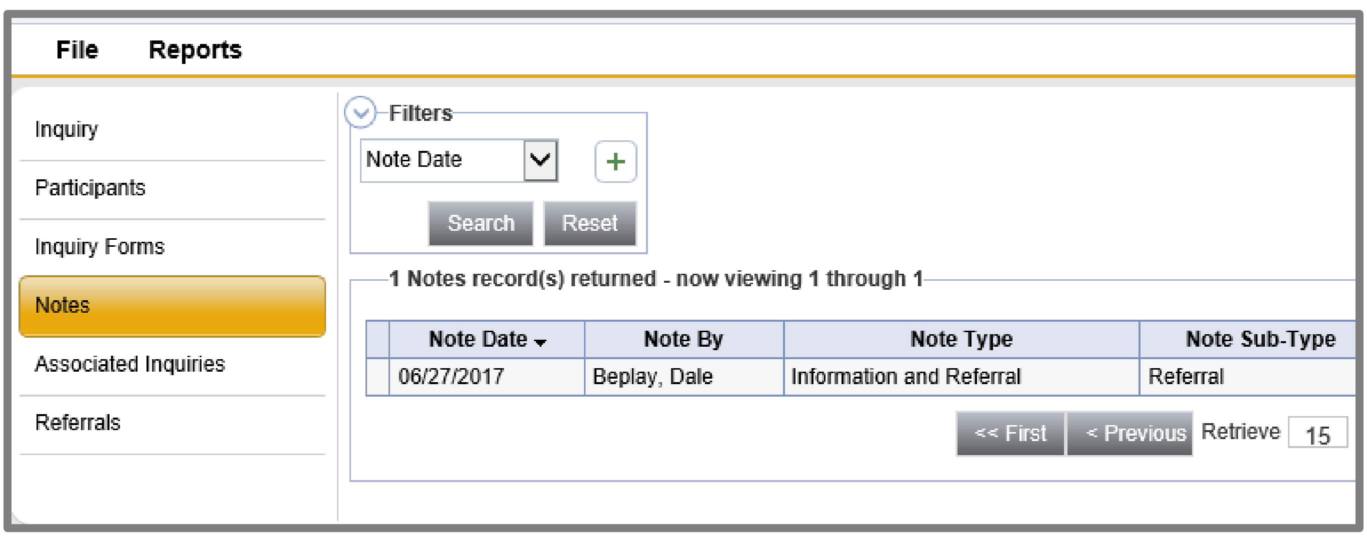
The **Participants** sub-page is used to document demographic details for the Person Seeking Supports (Potential Consumer) and other contacts, such as family members or doctors.



Participants list view

Inquiry Notes

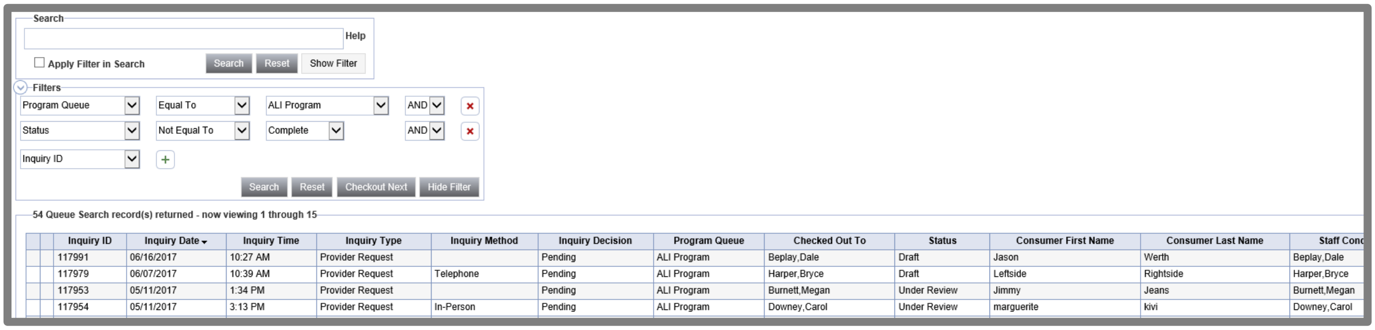
Notes are used to communicate from within Harmony. An Inquiry Note is required for all Inquiries submitted to the state, but each Program has its own Note Attachment requirements.



Inquiry Notes list view

Inquiry Queue

When users navigate to the **Inquiry** chapter, a queue displays records based on default filters. The queue is configured differently for state users and external workers. State staff will monitor this queue daily, for new provider request submissions.

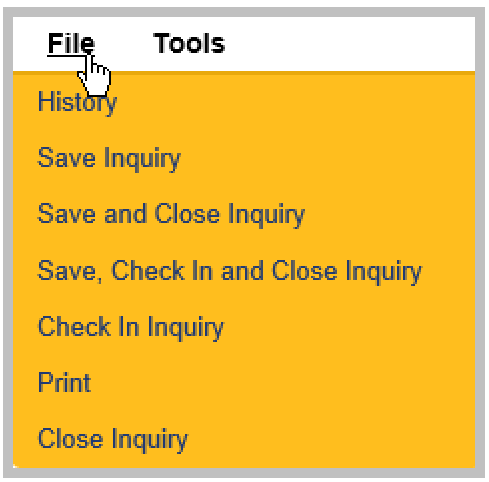


Inquiry Queue

Check-In the Inquiry Record

After you are finished creating the inquiry, several options exist to save, close and/or check in the record. These options are found on the **File** menu.

1. Click **File** and then select one of the options that are defined below.



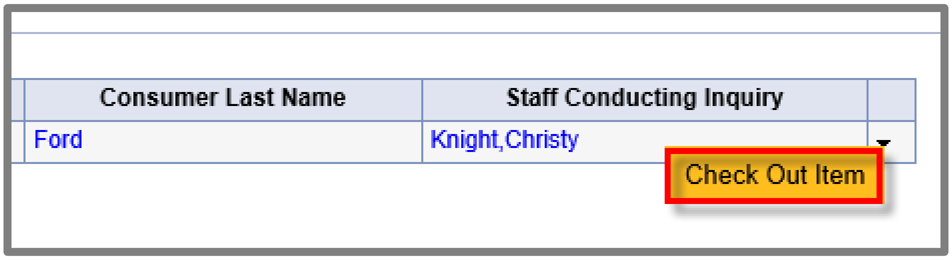
File Menu

Save Option	Click this when you want to
Save Inquiry	Save changes you have made to the record and keep it open and checked out.
Save and Close Inquiry	Save your changes and close the record but do not check the record in. **SDS will not be able to approve this request until you Check it In**
Save, Check In and Close Inquiry	Save your changes, close the record and then check it in.
Check in Inquiry	Check the inquiry in and keep the record open.

Check a Record Out

You can also check a record in from a list of records.

1. On the far right of the list, point to the Fly-out Menu and then click **Check In Item**.
    a. To verify that the record is checked in, point to . You should see **Check Out Item.**

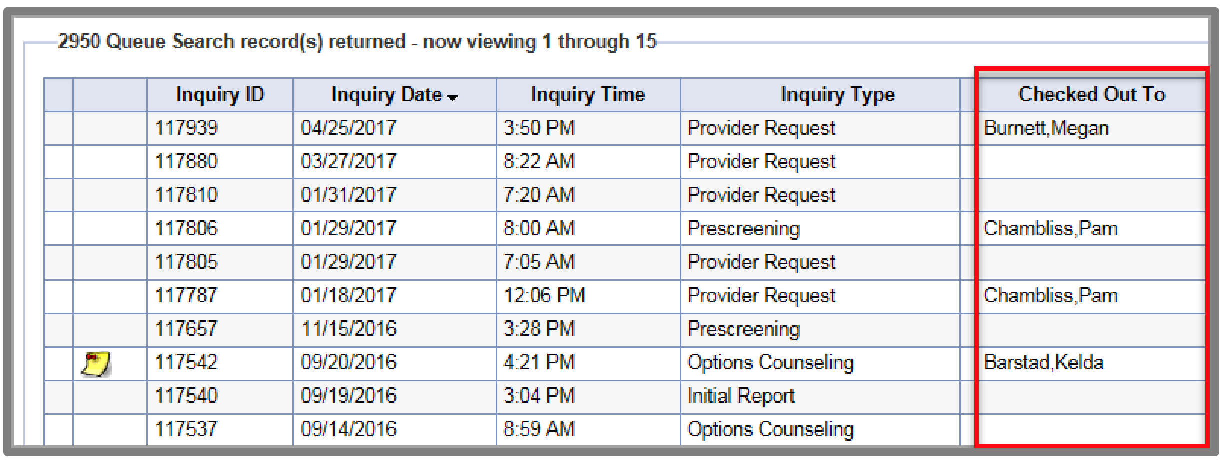


Inquiry List

See Who has a Record Checked Out

If a record is locked and you need to work with it, you can easily find out who has the record checked out.

1. Click the **Inquiries** chapter.
2. Search for the inquiry. For more information, see *Search for Records*.
3. The person who has the record checked out is listed in the **Checked Out To** column.



2950 Queue Search record(s) returned - now viewing 1 through 15

	Inquiry ID	Inquiry Date	Inquiry Time	Inquiry Type	Checked Out To
	117939	04/25/2017	3:50 PM	Provider Request	Burnett,Megan
	117880	03/27/2017	8:22 AM	Provider Request	
	117810	01/31/2017	7:20 AM	Provider Request	
	117806	01/29/2017	8:00 AM	Prescreening	Chambliss,Pam
	117805	01/29/2017	7:05 AM	Provider Request	
	117787	01/18/2017	12:06 PM	Provider Request	Chambliss,Pam
	117657	11/15/2016	3:28 PM	Prescreening	
	117542	09/20/2016	4:21 PM	Options Counseling	Barstad,Kelda
	117540	09/19/2016	3:04 PM	Initial Report	
	117537	09/14/2016	8:59 AM	Options Counseling	

Inquiry List

Chapter 10 Quiz

1. A new Care Coordinator requesting access to a consumer's record creates an:
    a. Inquiry record
    b. Consumer record
    c. Provider record

2. When you are finished creating or working with a checked-out Inquiry Record, what MUST you do so others can work with it?

Chapter 11 | Provider Records

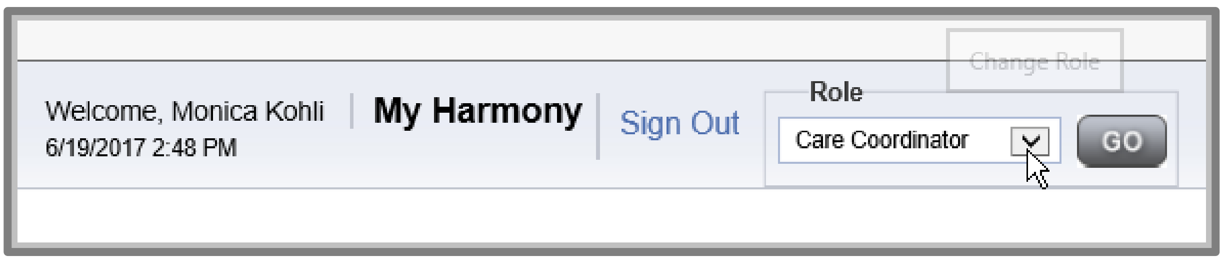
Introduction

A provider is an organization record in Harmony. Most providers in Harmony are service provider agencies, but individual care coordinators are also tracked as providers. The Providers chapter includes functionality to track certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information.

For the most part Care coordinators will access the Provider record during a Provider Search or when Associating a selected Provider to the consumer.

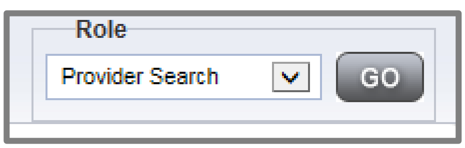
Change your role to Provider Search

In the upper right corner of the Harmony screen, click the down arrow in the Role section.



Change Roles Screen

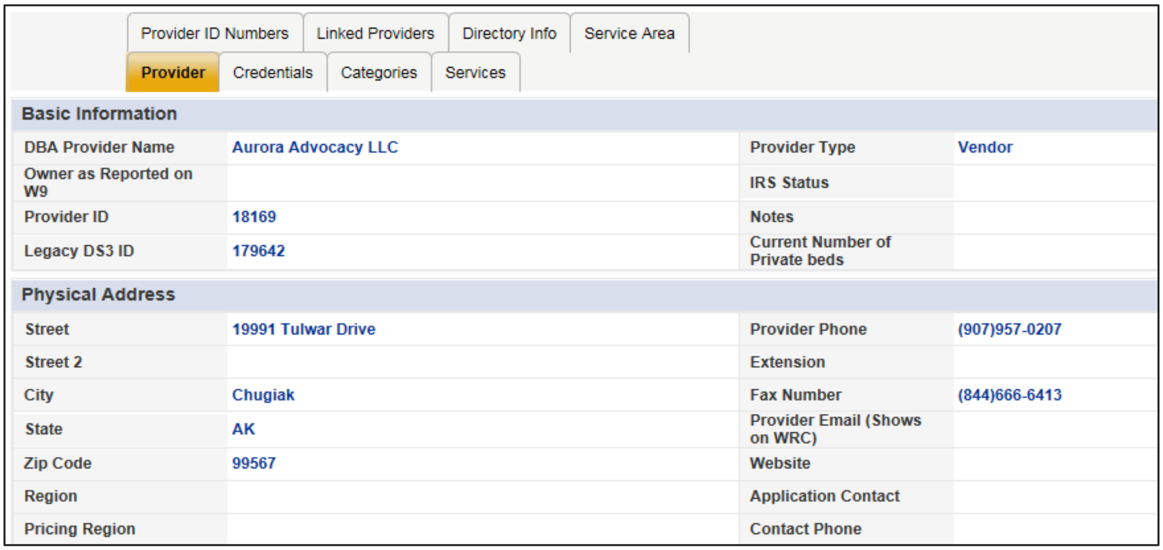
Click the "**Provider Search**" role. Then click **Go**.



Search for your provider by Agency name.

Provider

The main provider record contains the identification, location, and contact information.



Provider ID Numbers | Linked Providers | Directory Info | Service Area
Provider | Credentials | Categories | Services

Basic Information			
DBA Provider Name	Aurora Advocacy LLC	Provider Type	Vendor
Owner as Reported on W9		IRS Status	
Provider ID	18169	Notes	
Legacy DS3 ID	179642	Current Number of Private beds	

Physical Address			
Street	19991 Tulwar Drive	Provider Phone	(907)957-0207
Street 2		Extension	
City	Chugiak	Fax Number	(844)666-6413
State	AK	Provider Email (Shows on WRC)	
Zip Code	99567	Website	
Region		Application Contact	
Pricing Region		Contact Phone	

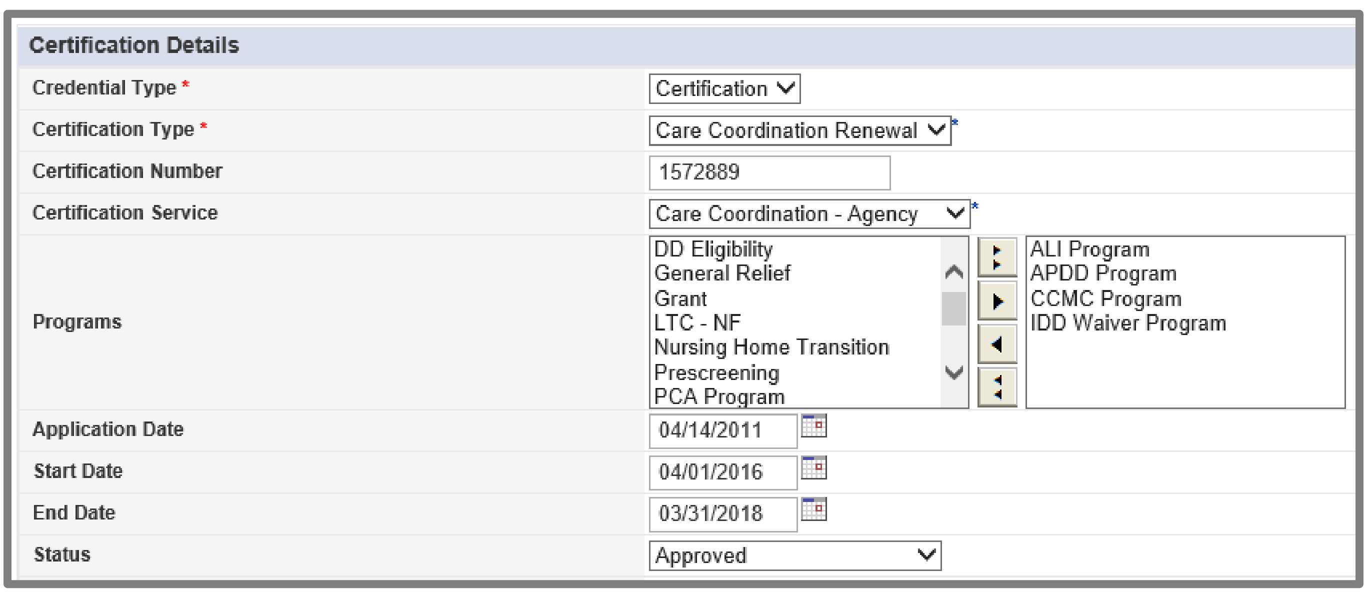
Provider Record

Note

The available tabs in the Providers chapter are determined by role.

Credentials

The **Credentials** tab is used by SDS to manage their provider network and to capture critical information about important credentials that establish whether a provider is qualified to render services. The Alaska Harmony system contains two types of credentials: certifications and licenses.

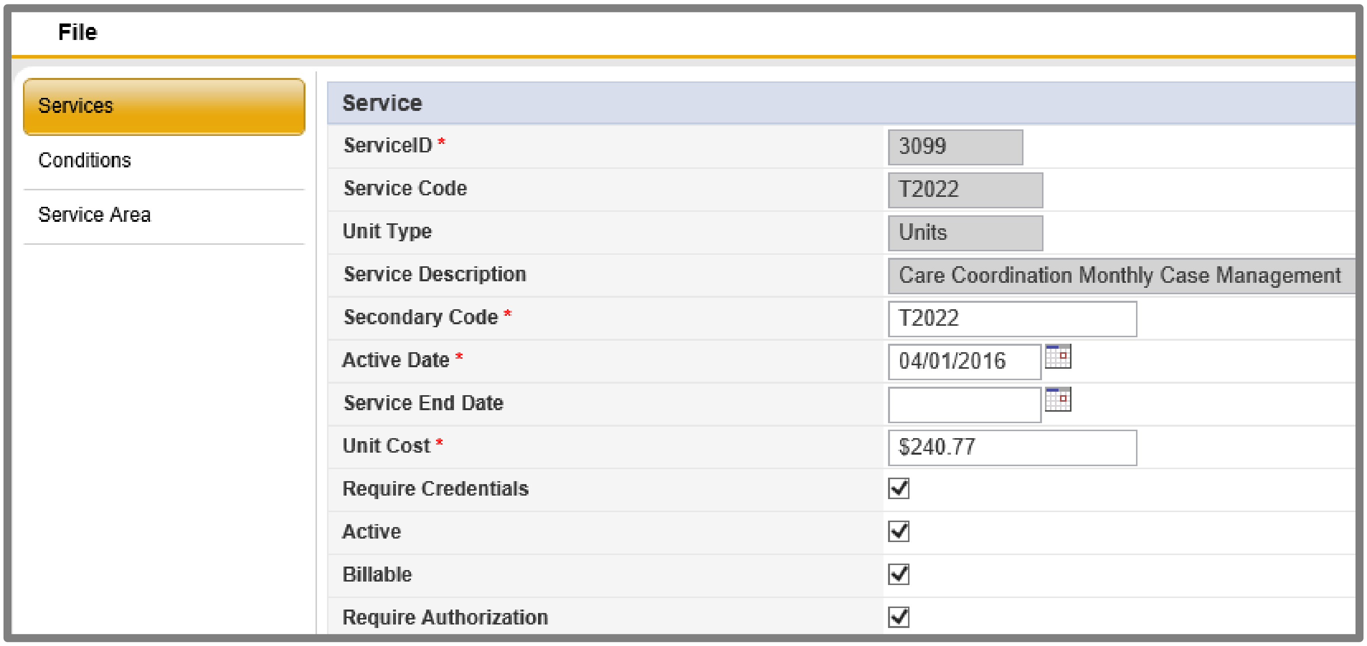


Certification Details	
Credential Type *	Certification
Certification Type *	Care Coordination Renewal *
Certification Number	1572889
Certification Service	Care Coordination - Agency *
Programs	DD Eligibility, General Relief, Grant, LTC - NF, Nursing Home Transition, Prescreening, PCA Program / ALI Program, APDD Program, CCMC Program, IDD Waiver Program
Application Date	04/14/2011
Start Date	04/01/2016
End Date	03/31/2018
Status	Approved

Provider Credentials Record

Services

The **Services** tab is aimed at capturing the services that a provider would offer to the community. Services are established in Harmony using the **Service Code Utility** and then each service is linked to the program or provider using the **Services** tab. A consumer has to be enrolled with a program/provider before services can be recorded in authorizations or activities for a consumer.



Provider Services

Provider ID Numbers

The **Provider ID Numbers** tab lists many of the different numbers used to identify your agency.

Division	Identifier	Type	Status	Start Date	End Date
SDS	1631359	061 Care Coordination Agency	Active	07/30/2015	06/30/2018
SDS	1871976662	NPI	Active	06/05/2017	
SDS	47-4177817	EIN	Active	06/05/2017	

Linked Providers

The screen will show you any agencies or organizations that have a certification relationship with the provider. Especially helpful to determine and associate an oversight agency for a Family Hab home, if there is one.

Service Area

The **Service Areas** tab is used as a repository for information about what areas the agency/provider may serve in the community. Care Coordinator can use the **Access Point** website to find providers based on this data.

Service Area	
Unrestricted	False
State	AK
Region	
Borough	Municipality of Anchorage
City	
Zip Code	

Service Area data

Experience

The **Experience** tab is used to capture critical information about important background and experience that establish whether a provider (or a worker associated with a provider) is qualified to render services. The **Experience** tab will track three types of experience (i.e., Professional Experience, Training and Clearances.)

File

Training	
Experience Type *	Training *
Training Type	CIR Training
Receipt Date	01/25/2011
Training Name	
Trainer	SDS
Start Date	01/25/2011
End Date	
Training Expiration Date	
Credits/CEUs	

Provider Experience Training Record

Glossary

Term	Definition
3rd Party Review	The 3rd Party Review tab in the Consumers chapter is used to track communication via notes between SDS and Qualis Health when outside review is needed to complete a consumer's level of care determination. This is part of the Material Improvement Review Process (MIRP).
Actions	The Actions tab in the Providers chapter is used to track and monitor disciplinary actions taken by SDS or DHCS Residential Licensing on a provider resulting from negative outcomes of a compliance review or an investigation, a provider's failure to renew certification or licensing, or a referral for an action by an outside entity. Actions may lead to formal enforcement actions, sanctions, or fines, as well as appeals from the provider subject to the action.
Advanced Search	A search page is used to select an entity. Advanced Search pages allow the user to search using multiple filters and display the contents with default filters for the most common search scenario. Like a list page, a search page has filters at the top, a search button in the middle, and search results below. The Advanced Search page is the gateway to loading a chapter. Users click to select a record from the search results to open it and load that record as the entity for the chapter. Examples include Consumer Advanced Search, Provider Advanced Search, and Inquiry Queue Advanced Search.
Alert Note	A Harmony feature to highlight critical information on a consumer or provider by displaying a note immediately in a pop up window every time a user selects that entity. A note displays as an alert if the note status = 'Alert'.
Appeals	The Appeals tab in the Providers chapter is used to document when a provider appeals a decision, ruling, or notice that they are out of compliance. A provider has the right to appeal the finding(s). SDS staff can add and update appeals, associate them to actions, and monitor the status.
Appointments	The Appointments tab in the Consumers chapter is used to track consumer assessment appointments. Provider users can be invited to appointments, and invitation responses can be tracked.
Attachment	A file attached to a note on a consumer, provider, or inquiry record. A note can contain up to five attachments. Users can designate an attachment file name and select an attachment category.
Authorizations (Auth)	The Authorizations (Auths) tab allows a user to pre-authorize a consumer to receive specific services from specific providers. Each authorization is associated with a specific provider and date range. The service(s) that provider is authorized to deliver are entered under the Auth through the Auth Service subpage.
Case Relations	The Case Relations tab in the Consumers chapter is used to track family members, advocates, emergency contacts, and other contact people for a consumer.
Categories	The Categories tab in the Providers chapter is a tool to classify the various kinds of provider records in Harmony. Categories can be used to automatically assign relevant services to the provider as part the certification approval process.

Term	Definition
Chapter	Chapters are the core workspace areas in Harmony. Examples include Inquiry, Consumers, Providers, Inquiry, and Reports. The Consumers and Providers chapters are organized into tabs. The Inquiry chapter omits the tabs and navigates directly to the Inquiry page and subpages. The My Harmony chapter is organized by columns of widgets that navigate to targeted list pages and queues. The Reports chapter displays a list of all summary reports available for the current role.
Check Out/Check In	Check Out/Check In is a Harmony feature used on Inquiries to limit edits to an Inquiry record to one user at a time. To edit an Inquiry, a user must check out the record. When the user is finished, they should check in the Inquiry.
Close	A file menu option to close the current window without saving any changes. The Close menu option will bring the user back to the previous window and refresh that window.
Consumer	An entity record for a person who is an applicant for or recipient of services. In the Consumers chapter, users work with one Consumer record at a time.
Consumer Module	The Consumer Module tab in the Consumers chapter is used to grant the consumer and authorized contacts access to log in to that Consumer's record in the Consumer Module application. A representative for each consumer on the DD Registry is required to log in to the Consumer Module and complete an annual *DD Registration and Review* form.
Credentials	The Credentials tab in the Providers chapter is used by SDS to manage provider certifications and by DHCS Residential Licensing to track Assisted Living Home licenses. Certification credentials are distinct by certification service and indicate the applicable programs.
DD Registry	The DD Registry in Harmony is a wait list feature used to track consumers on the DD Registry waiting for IDD Waiver or ISW programs. The entire DD Registry is accessible from My Harmony > Tasks. If a Consumer is on the DD Registry, their Registry record is accessible from their Consumer record in the Consumers chapter > DD Registry tab.
Detail Page	A basic type of screen in Harmony used to add or edit a record. Most detail pages contain a single vertical column of data entry fields with the field label on the left and the data entry field to the right. After a record is initially saved, the detail page displays a subpage menu to the left, if applicable. The Detail Page is also referred to as an Edit Page.
Directory Info	The Directory Info tab in the Providers chapter contains settings that control whether a Provider record is published to or excluded from the Access Point online directory.
Division	Divisions in Harmony represent major lines of business; for example, "SDS" is a distinct Division from "ALL" (Assisted Living Licensing). The system requires that Consumers and Providers be active in at least one Division to be considered active in the system. Consumers must be active in the SDS Division before they can be associated with a Program. The Division is also known as Fund Code.
Edit	User account permissions to update/modify to the data in a record.
Entity	A core record in Harmony that functions as the centerpiece of a chapter. Examples include Consumer, Provider, and Inquiry.
Experience	The Experience tab in the Providers chapter is used by agencies to manage their provider network. Critical information about important background and experience is tracked, which establishes whether a provider (or a worker associated with a provider) is qualified to render services.
Fair Hearings	The Fair Hearings tab in the Consumers chapter is used to track appeals and fair hearing process information.

Term	Definition
File Menu	A list of options for user actions on a List Page or Detail Page. Options vary by page; examples include: Add New, Save, and Close. The File Menu bar can include other menus such as Tools, Reports, and Word Merges.
Forms	Forms in Harmony are data entry screens specific to Alaska SDS. Examples include the CAT Assessment and Level of Care Determination. The Forms tab is available in both the Consumers chapter and Providers chapter and displays records entered for the current Consumer or Provider through a Harmony form.
Inquiry	The Inquiry chapter is used for tracking system “front door” interactions including requests for information from an ADRC, prescreening, program referrals, and requests from Providers to access to a Consumer record in order to submit an application. The Inquiry Advanced Search page can be filtered by work queues based on program. Inquiry records identify a Person Seeking Supports that can be copied to create a new Consumer or link to an existing Consumer to facilitate Provider access. Once access is granted, the Provider can apply for and coordinate services in the system.
Linked Providers	The Linked Providers tab is used to track formal relationships between Providers. Examples include Care Coordinators associated with Care Coordination Agencies and rendering Group Homes and Family Habilitation Homes operated by or contracted with Certified Billing Providers.
List Page	A basic type of screen in Harmony used to display a list of records in a particular information area. A list page functions like a search page with preset filters that display the results automatically. Most list pages allow the user to modify the filters and refresh the lists. When a user clicks on a record in the list, that record opens in a detail page in a separate window. Also referred to as a List View or Grid.
Monitor	The assignment of a State Staff Worker to a specific Provider record for certain responsibilities related to certification, licensing, or compliance.
My Harmony	The system home page that presents panels and queues of records in the system that are relevant to the current user, including assigned Tickler tasks, Notes to be read, and Consumer caseloads.
Note	A note is used to communicate with other agencies and/or workers or for moving a process to the next step. Notes can be tracked in several areas in the system, including Inquiries, Consumers, Consumer Plans, and Providers.
Note Recipient	Notes functionality that allows a user to route a Note to one or more workers to prompt them to read and review the Note. Note Recipients will see Notes routed to them on My Harmony, and the system tracks if the Recipient has read the Note.
Note Type and Sub-Type	Notes are used to track a wide variety of information, and Note Types and Sub-Types are the categories for classifying Notes.
Open	To load a page in Harmony. Usually refers to loading a Detail Page to view or edit a record by clicking on the row for that record in the results of List Page or Search Page.
Panels	Widgets on the My Harmony home page that contain a header and a breakout of line items by type or status with a count of related items. My Harmony panels provide at-a-glance counts of key information like assigned Ticklers, Notes to be read, and Consumers on a caseload. Panels are also links to access lists of records that are included in the counts.
Participant	A record for a person associated with an Inquiry. Examples include a Person Seeking Supports, an Involved Person in a Central Intake report, a Reporter, and other Contacts.

Term	Definition
Plans	The Plans tab in the Consumers chapter is used to track Plans of Care and Service Plans. Plans are specific to a program and a service period date range. Consumers have a separate Plan record for each renewal cycle or plan amendment. Plans can include Planned Services, Needs and Goals, Forms, and Notes.
Primary Worker	A Worker assigned to a Consumer on a Division or Program record. Primary Workers can receive tickler tasks and reminders for their assigned Consumers.
Professional Relations	The Professional Relations tab is used to track Consumer case contacts who are workers in the system.
Programs	The Programs tab in the Consumers chapter is used to track a Consumer's involvement in a formal Program. The Program Status field is the key indicator of the Consumer's current status in the stages of the program life cycle across processes for application, assessment, planning, active service engagement, renewal, and closure.
Provider	A Provider is a core record in Harmony that represents an organization. The Providers chapter includes functionality to track certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information. In the Consumers chapter, Providers associated with Consumers they serve and identified on specific services in plans and authorizations.
Provider Associations	The Provider Associations tab in the Consumers chapter is used to connect a Consumer to any Providers involved in their case, such as Care Coordination Agencies, PCA Agencies, and placement facilities. An active Provider Association is used to grant external Provider agency workers access to a Consumer's record to submit applications and coordinate care.
Provider ID Numbers	The Provider ID Numbers tab in the Providers chapter tracks official identification numbers for the current Provider, such as Medicaid IDs by Provider Type, NPI, and PVN.
Quick Search	A shortcut search tool alternative to Advanced Search designed to find a record using a single key search filter such as Consumer CaseNo or Inquiry ID.
Record	An entry in a table in the Harmony system database. Harmony List Pages and Search Pages display lists of multiple records, whereas Detail Pages display the fields within a single record for viewing or editing.
Reports	Reports are tools for getting data out of the system. Harmony includes standard reports as well specific reports built for Alaska SDS. Reports may display data from a single record, such as a form, for the purpose distribution or signature, or combine information across records.
Required Fields	A field on a page must be completed before the page can be saved. Required fields are designated with a red asterisk.
Reverse Status	A File menu option to reverse the status of a record that has been saved with a status of "Complete" or "Approved," which locks the record as read-only. Reverse Status is used when a record needs to be modified after it has been completed or approved. Permissions to reverse status are limited to select roles, including supervisors. Also referred to as Reverse Disposition.
Role	A Role is a system profile in Harmony that defines a user's security permissions and available functionality necessary to perform job duties.
Save	A File menu option to save changes on the current page but keep the page open.
Save and Close	A File menu option to save changes on the current page and also close the page. Upon close, the system will navigate the user back to the previous screen.
Service Area	The Service Areas tab in the Providers chapter is identifies the geographic locations served by a Provider.

Term	Definition
Services	The Services tab in the Providers chapter identifies the specific services or procedure codes that a provider is eligible to deliver to recipients, as well as any specific service rates for that provider. Services in the Consumers chapter can be added to plans.
Subpage	An information area under a primary record. Subpages are displayed in a page menu on the left side of a Harmony screen with the primary record as the top page in the menu. Clicking on a subpage typically displays a list page of the records that are associated under that primary record. Examples include Planned Services under a Plan, Inquiry Participants under an Inquiry, and Consumer addresses under Consumer Demographics.
Tab	An information area with a chapter. Tabs are displayed in rows across the top of a chapter screen, above the list page area. Clicking on a tab brings the user to a list page of the records in that area for the current, selected entity in the chapter.
Tickler	A Tickler is a system-generated to-do task or message reminder. Ticklers can be scheduled based on process timelines such as a prompt to submit a renewal application or plan, or triggered by data entry events such as the submission of an application or plan for review.
Unlock Record	See Reverse Status.
User	A user account authorized to log into Harmony. Every user must be linked to a Provider Worker.
Word Merge	A Harmony feature to generate an output form populated with system data via merge fields within a template. Word Merge is typically used to generate notices or letters. Word Merge templates are pre-configured to merge specific data points and are generated via the Word Merge File menu and via Workflow Wizard tasks. After Word Merges have been generated, they can edited in Microsoft Word, printed, and saved as note attachments in Harmony in PDF or Word format. Word Merge also refers to the resulting output.
Worker	The Workers tab in the Providers chapter tracks the individual staff members at a Provider or State organization. Workers may or may not also be system users.
Workflow Wizard	An automated feature in Harmony to prompt the user with a set of tasks or reminders that pop up in a separate window when triggered by a specific data entry event. Each task in a Workflow Wizard is a tickler and remains on the user's tickler list on My Harmony, until it is completed.

Appendix: Quiz Answers

Chapter 1

1. MyAlaska
2. True

Chapter 2

1. D. All of the above
2. True
3. a. Go

Chapter 3

1. a. and b.
2. True

Chapter 4

1. False.
2. d. All of the above

Chapter 5

1. True
2. Providers
3. b. Care Coordinator

Chapter 7

1. Plan
2. Harmony System, you
3. Yes
4. 5
5. No

Chapter 8

Chapter 9

1. False
2. 1-B, 2-C, 3-A
3. My Ticklers

Chapter 10

1. a. Inquiry record
2. Check it in

Chapter 11

1. True.